

ePlans Park Construction Permit User Guide

Version 1.0

July 1, 2015





The Maryland-National Capital Park and Planning Commission

Montgomery Parks



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Table of Contents:

INTRODUCTION.....	5
How to Use This Document.....	7
Purpose.....	8
Project Roles.....	9
Workflow Overview.....	11
Quick Reference.....	12
GETTING STARTED.....	13
Technical Requirements.....	15
Logging In For the First Time.....	15
Logging In After the First Time.....	17
Accessing Projects.....	19
WORKFLOWS.....	21
Applicant.....	23
OTHER FUNCTIONS.....	39
Folder Management.....	41
Measure Tools.....	44
Takeoff Tools.....	45
Reporting.....	49
Publishing Changemarks.....	52
APPENDIX.....	55
Allow Trusted Sites.....	57
Disabling Pop-Up Blocker.....	59
Disabling User Account Control.....	61
Installing ActiveX Controls.....	63
Park Facility Codes.....	64
GLOSSARY.....	73



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INTRODUCTION



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How to Use This Document

ePlans is a powerful tool that streamlines the plan review process and improves accountability among all of the process's participants. The review process and the software have been set up to maximize flexibility, allowing the Project Manager the ability to utilize as many or as few of the available features as he or she is comfortable with. While each project begins with a standard template, that template can be modified to meet the specific needs of each individual project.

The intent of this document is to provide an overview of the core components of ePlans and to guide all ePlans users through a standard document review process, known as a Workflow. As you gain proficiency with ePlans, you will discover many advanced functions and features throughout the software that are not covered in this guide. While ePlans is the official name of this software, this manual refers to it as ProjectDox as well. The terms are used interchangeably throughout this manual and within the software.

This manual is organized into six main sections: an [Introduction](#), [Getting Started](#), the [Workflows](#), [Other Functions](#), the [Appendix](#) and the [Glossary](#). The document starts with general information about ePlans, progressing to more specific descriptions of individual functions within the system. Read the Introduction and Getting Started sections before using ePlans to gain a general understanding of the purpose and function of the system. Once you begin to use ePlans, you can refer to the information in the Workflow and Other Functions sections as it pertains to your specific role in the Workflow.

[Introduction](#): This section provides an overview of the purpose and function of ePlans within the Park Development Division's plan review process. It also defines the roles of the various user groups, introduces the Workflow and provides some quick reference tools.

[Getting Started](#): Your computer must be properly configured to run ePlans. Before you begin, consult the Technical Requirements checklist. This section will also guide you through the process of creating a login and password for ePlans.

[Workflows](#): The Workflow is the business process for plan review established by the Park Development Division, translated into the customized ePlans platform. This section is divided into four subsections that relate to the four user groups in the Workflow: Project Manager, Consultant, PDCO Team and QAP Officer. Refer to the subsection for your user group for step-by-step instructions to complete each of your tasks in the Workflow.

[Other Functions](#): ePlans contains several reporting, publishing and document storage functions that can be used outside of the Workflow. This section provides a guide for using many of those functions.

[Appendix](#): The Appendix contains additional technical information that provides some troubleshooting instructions to ensure ePlans functions properly on every user's machine. Network Administrators are the primary audience for the Additional Technical Information.

[Glossary](#): As you read this manual, refer to the Glossary to understand the ePlans-specific terminology.



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In addition to this Comprehensive Guide, there are several other reference documents that provide more in-depth information about ePlans and its various functions.

- While you are inside the ePlans platform, you can click on the “Help” button on the Main Tool Bar (see the “Getting Started” section of this guide). There is a lot of useful information in the ePlans help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The Brava Tool Tips user guide provides you with an in-depth description of all of the features that are available in the Brava Viewer. The user guide is available online, at the following address: ftp://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf
- ePlans’ parent company, Avolve Software, has an Online Knowledge Base that contains information based on previous customer-support calls. Search their database at the following address: <http://www.avolvesoftware.com/index.php/company/technical-support/online-knowledge-base/>
- A training presentation has been created by Avolve Software and was given to Project Managers and PDCO Team members when ePlans was launched. Contact a Network Administrator for a copy of this presentation.

Purpose

ePlans is an online document review, storage and submittal platform created by Avolve Software and tailored for the Park Development Division (PDD) of the Montgomery County Parks Department. ePlans allows the PDD the ability to organize and formulate comments for Applicants based on feedback from the Planning, Design, Construction and Operations (PDCO) Team.

By using ePlans to create online, virtual project workspaces, you enable people from across divisions at different locations, disciplines and schedules to share the same information at the same time, facilitating communication and higher productivity.

Here is what ePlans does to enable online project information management:

- All of the shared project information (documents, drawings, 3D models, annotations, project email, discussion threads, and faxes) is centralized in one location so it is visible, accessible and usable by everyone who needs it.
- The user-friendly interface makes it easy for users at all technical skill levels to leverage the “power tools” in ePlans.
- Permissions and roles-based security restrictions are configured and applied so that only appropriate personnel have access to project information, as well as subsets of that information.
- Using electronic Workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and enforce accountability.
- ePlans uses version control to track changes within a document.



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- Automation features make sure that when activity takes place in the workspace, those who need the updated information are informed immediately.
- Plan, document and markup viewing tools, online discussions, and group email provide for timely information and a more productive review for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, email, annotations and markups, Workflows and forms, access and egress, plus much more.

In summary, ePlans allows the stakeholders in a project to manage information, communication, activity and resources better than manual or conventional means.

ePlans was brought to the Montgomery County Parks Department as part of a collaborative effort with the Montgomery County Planning Department. For the most part, the ePlans platform was tailored to meet the distinct needs of each department in the collaboration. Some shared elements could not be modified to individual department specifications, however, resulting in the occasional appearance of lines of text, instructions or nomenclature that is irrelevant to the Park Development process. Every effort has been made to minimize the occurrence of these elements, and none of them interfere with the Park Development Workflow or the Montgomery County Parks' ability to use ePlans.

Project Roles

This comprehensive guide is designed for anyone involved in the Park Construction Permit process that is responsible for reviewing design and construction documents using ePlans. ePlans users include Applicant, Construction Supervisor, PDCO Team members, Lead Technical Reviewer and External Stakeholders.

[Applicant](#)

The Applicant is a person or group who needs a Park Construction Permit issued by the Park Development Division. The Applicant is responsible for filling out the Park Construction Permit Application and uploading his or her documents to ePlans for review by the Construction Supervisor, Lead Technical Reviewer, and the PDCO Team. The Applicant will also receive and respond to comments made by the Construction Supervisor, Lead Technical Reviewer, and PDCO Team

[PDCO Team](#)

The Planning, Design, Construction and Operations (PDCO) Team consists of Montgomery County Parks' employees from various divisions whose work programs are directly impacted by a park development project. PDCO Team members will use their individual expertise to review and comment on an Applicant's drawings for accuracy and completeness. The Lead Technical Reviewer is always a part of the PDCO Team.



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[Construction Supervisor](#)

The Construction Supervisor is the first and last person to review a set of documents before a permit is approved. This role also uploads the As Built Drawings, once they are received from the Applicant.

[Lead Technical Reviewer](#)

The Lead Technical Reviewer is in charge of the PDCO Team's correspondence with the Applicant and Construction Supervisor. This ensures clarity with correspondence during the workflow.

External

Any person or agency outside of Montgomery County Parks who has review authority over or is directly impacted by a project is considered part of the External User Group. Although a Project Manager can elect to provide external stakeholders with ePlans access, their review of a Consultant's drawings is usually conducted outside of the Park Development Workflow.

Other

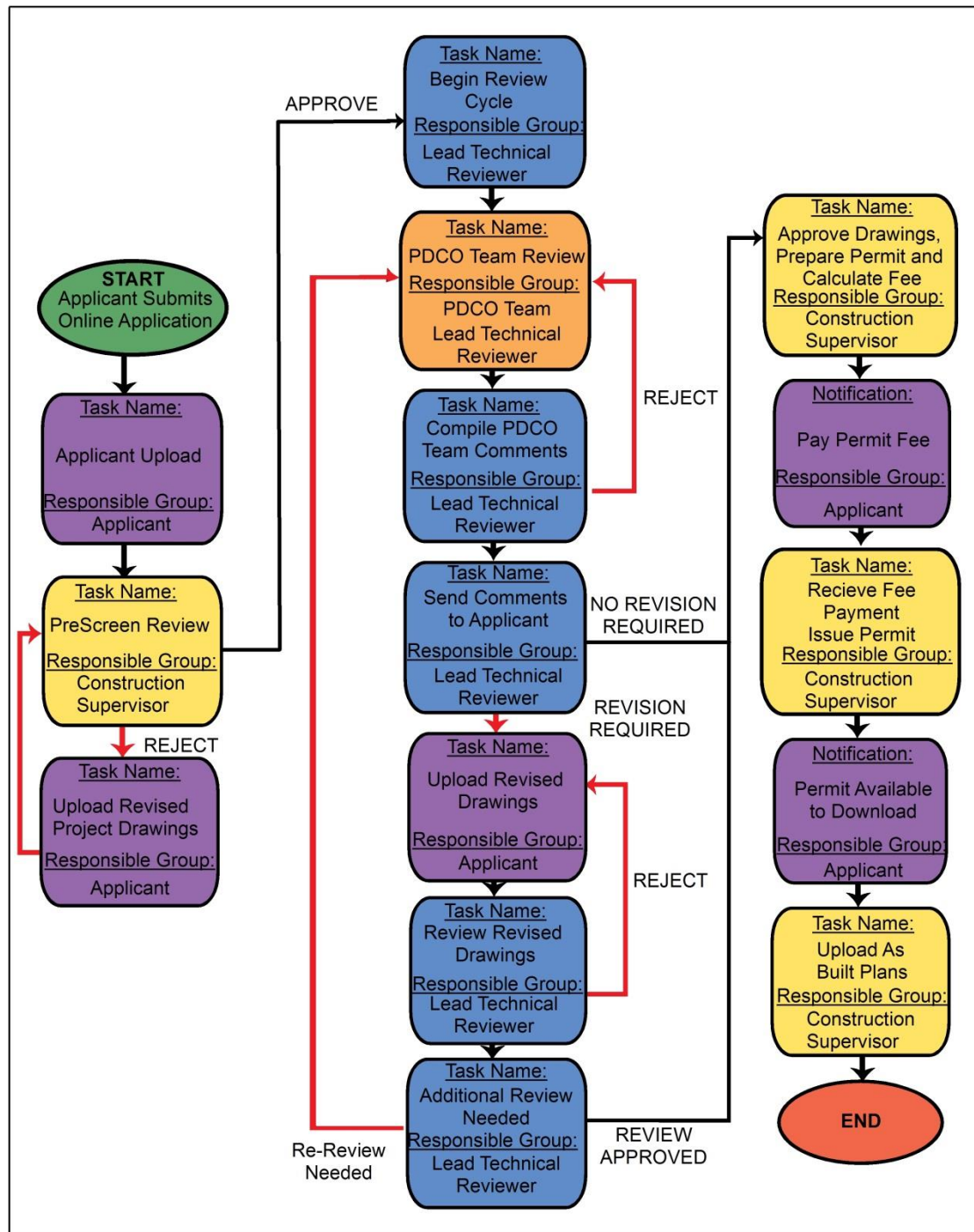
The "Other" user group was created to provide a Lead Technical Reviewer with flexibility when creating his or her project team. This group can be used when assigning users to a project that may participate in a limited number of review cycles, or have special permissions, apart from those granted to other groups.



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Workflow Overview

The flow chart below provides an overview of the steps involved in the ePlans Park Construction Permit review. This chart is referred to as the Workflow.





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Quick Reference

Below are some of the most common icons found throughout ePlans. You can also hold your cursor over an icon at any time to see a brief description.

Project icons		Folder Icons		File Icons		Reprographics Icons	
	Revoke permissions		Delete Folder		Delete File		Add item to Cart
	Project Topics/Notes Exist. Project Topics/Notes don't Exist.		Find Topic or Note in Folder		Topics/Notes Exist. Topics/Notes don't Exist.		View/Print Shipping label
	Edit Project		View File or Folder History		View File in Separate Window		Ordering not allowed
	View Project information		Add New Folder		View File in Pane		View Cart
	Send TeamMail to project or Single user		Rename Folder		Redline Exists for this File		Order Pending Ready to Ship
	Display calendar – Click to select date		View or Manage Folder Permissions		Download File	Administration Icons	
	ProjectDox Help		Subscribe to this Folder for email Notification		Move File(s) Copy File(s)		View or Edit User Permissions
	Refresh Page		Currently Subscribed to this Folder		Start Workflow against file		Edit Workflow Definitions
	Topic Open		Inherit parent permissions		Compare files		Setting not editable or closed
	Edit Topic		Arrange sort order		Check-In File Check-Out File		
	Edit Picklist Data		Subscribed to a folder/ subfolders		Copy internal/external markup link to Clipboard		
	User logged in Not logged in				Edit select file's metadata		
					Batch Stamp selected files		



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GETTING STARTED



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Technical Requirements

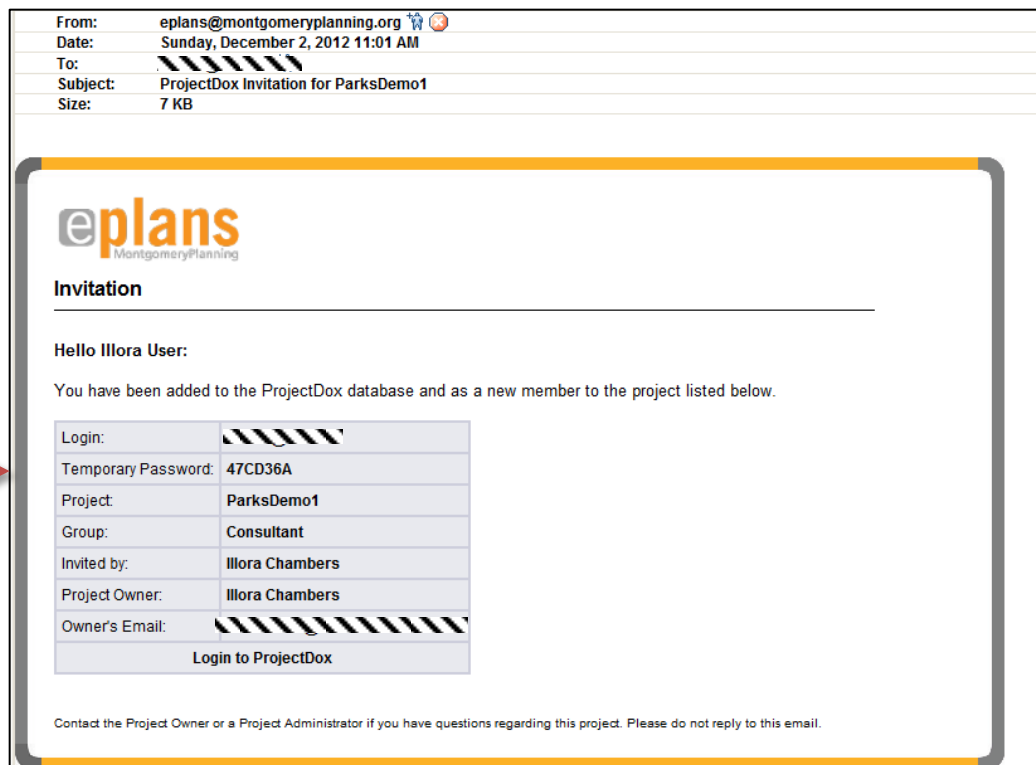
ePlans is designed to be a user-friendly program, understandable to anyone who possesses basic internet navigation skills and has a valid e-mail address. Before you begin, you will need to make sure you are using a computer that meets all of the minimum technical requirements necessary to run ePlans.

- A computer with a 32-bit processor and Windows XP, Windows Vista or Windows7 installed as the operating system.
- A high-speed internet connection, such as cable or DSL.
- Internet Explorer Version 8 or 9, with the pop-up blocker turned off (see the Appendix for instructions on [disabling your pop-up blocker](#)). *ePlans does not currently support other web browsers such as Safari, Firefox or Chrome.*
- Temporarily disabled User Account Controls (for Windows Vista and Windows 7 users only. See the Appendix for instructions on [disabling User Account Controls](#).) UAC can be re-activated once ePlans components have been installed.
- ActiveX controls (see the Appendix for [ActiveX download instructions](#)).

Logging In For the First Time

The first time you are invited to join a project on ePlans, you will receive an e-mail notification, similar to the one below. This e-mail will contain a temporary password and a link to ePlans.

1. Copy the temporary password that was provided to you in the e-mail.





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- Click on the link that says "Login to ProjectDox." This will automatically open Internet Explorer and take you directly to the login screen. *You can also open Internet Explorer and type in the address <http://eplans.montgomeryplanning.org>. At this point you can bookmark the page for future use. Alternatively, a link to this page will be provided to you every time you receive an e-mail notification from ePlans.*

MontgomeryPlanning.org | MontgomeryParks.org | M-NCPPC Montgomery County

eplans MontgomeryPlanning

Enter your e-mail address and password to continue.

MONTGOMERY COUNTY
TERMS AND CONDITIONS OF USE

Your access to and use of the Maryland National Capital Park and Planning - Montgomery County (MNCPPC-MC) ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below,

E-mail:

Password:

Login [Forgot your password?](#)

E-mail Address

Temporary Password

Login

- Enter your e-mail address (the same address where you received the invitation to join the project) into the E-mail Field.
- Type or paste the temporary password into the Password Field and click "Login." The password is case sensitive and must be entered exactly as it was provided to you in the email.

Change Password:

New password:

Confirm new password:

Password Reset Question & Answer:

Security question:

Security answer:

Profile Information

Contact Information | User Metadata | Project Membership | Group Membership

Save

* Required field

First Name: Nikki Last Name:

Email: .com ☒ HTML format [i](#)

Title: Architect

Company: Avolve Software

Address 1:

Address 2:

City: Scottsdale

State/Province: AZ Postal Code: 85254

Applicant's Phone: 602-903-0000 Fax:

Mobile: Parcel ID:

Stamps: [i](#)

Language: en

Reset Password

Security Question

Personal Information



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5. Once you successfully log in, you will be taken to your User Profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself. Keep your new password and security answer in a safe place. You will use this password the next time you log in. If you ever forget your password, you will need to answer the security question you created to reset your password.
6. Fill in all of the required fields (those marked with a red asterisk*), and click "Save." *You can return to this screen at any time by clicking on the "Profile" button on the Main Tool Bar.*
7. After saving your profile information, you will be taken to the Projects Screen.

Logging In After the First Time

The second time you log in to ePlans (and every time after that); you will use the password that you entered in your User Profile page. If you ever forget your password, click on the "Forgot Your Password?" link next to the "Login" button.

After logging in, you will be taken to the Active Projects Screen. From this screen, you can view all of the projects you have been invited to and all pending tasks for you to complete.

The screenshot shows the ePlans MontgomeryPlanning.org interface. The top navigation bar includes links for Back, Forward, Projects, Profile, and Logout. Below this is a search bar and a 'Task List (All Projects)' button. The main content area displays a table of projects with columns for Project Number, Options, Project Name, Project Coordinator, and Status. A 'Project Search Field' is located above the table. Below the table are 'Project Sorting Buttons'. The table lists three projects: 'Parks DEV Project', 'Parks DEV2 Project', and 'ParksDemo1'. Below the table is a 'Task List' section with columns for Project Number, Task, Attached To, Status, Created On, Updated On, and Updated By. The 'Task List' shows a single task for 'ParksDemo1'. At the bottom of the interface are 'Navigation Buttons' for Back, Forward, Projects, Profile, a Reload button, a Search button, a Help button, and Logout.

Callouts from the right side of the screenshot:

- Main Tool Bar (see enlargement below)
- Project Search Field
- Project Sorting Buttons
- Project List
- Task List
- Navigation Buttons

An enlarged view of the navigation buttons at the bottom of the interface. The buttons are: Back, Forward, Projects, Profile, Reload, Search, Help, and Logout. The Reload, Search, and Help buttons are highlighted with red boxes and labels.

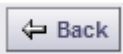







Callouts from the bottom of the screenshot:

- Reload
- Search
- Help





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Main Tool Bar – This group of buttons provides your primary navigation functions.

- The “Back”  and “Forward”  buttons function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed.
- The “Projects”  button will take you back to the Active Projects Screen.
- The “Profile”  button will take you to your User Profile, where you can edit your personal information or change your password.
- The “Reload”  button will refresh the current page you are on.
- The “Search”  button allows you to search for a project based on the information entered into the Project Info Page, or it allows you to search for keywords within a project.
- The “Help”  button takes you to the ProjectDox Help site. There is a lot of useful information in the help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The “Logout”  button logs you off of ePlans and takes you back to the Login Screen.

Project Search Field – The search feature is a partial word search and will provide results that contain the words entered into the Search Field for any of the highlighted columns above. For example, a search for “DE” for the above projects would result in all three projects displaying because each project has “DE” contained under the Project Number field.

Project Sorting Buttons – After conducting a project search, you can view all of your projects again by clicking on the “All Projects”  button. The “Recent Projects”  button will show the 15 most recently accessed projects.

Project List – The Project List provides you with basic information about every project to which you are assigned. You can sort your projects by number, name, coordinator or status. Clicking on the project number will take you to that project’s main page.

Task List – The Task List shows any tasks requiring action from you for all of your projects. Clicking on the task will take you to the eForm for that task; there you can get further instructions for completing that task.

Navigation Buttons – The Project List and the Task List are set to display a limited number of entries at a time. You can use the navigation buttons at the bottom of each list to scroll through all of your projects or tasks.








Accessing Projects

When you click on a project number in your Project List, you will be taken to that project's Main Page. Here you can access all of the files that have been uploaded to that particular project, view project information and communicate with other members of the Project Team.

The screenshot shows the eplans interface for project IRCNOVTEST2. The top navigation bar includes links for Back, Forward, Projects, Profile, and a Log out button. Below this is a Main Tool Bar with buttons for Tasks List, Info, Notes, Email, and Edit. The left sidebar shows a file tree with folders like Current Submissions, Documents, Drawings, Project Permits Folder, Photos, Procurement and Contract, Project Correspondence, Uploads, and ChangeMarkReports. The main content area has two tabs: Project Info (selected) and Reports. The Project Info tab displays a form with fields for Project Number, Project Name, MNCPPC Contact Information, Location, Applicant, Applicant's Email, Applicant's Phone, Application Type, Parcel ID, Project Coordinator, Project Coordinator's Email, Project Admins, Status, Planning Info Link, Project Start/End, Pass-Through, Incoming Files, and Versioning. Red callout boxes on the right point to the Main Tool Bar, Project Name, Reports Tab, Project Info Tab, and Project Files.

Main Tool Bar – The top row of the Main Tool Bar is identical to the Main Tool Bar in the Active Projects Screen. The bottom row provides a number of additional features.

- The “Tasks List”  will take you to a list of all of the tasks pending for this project. Project Managers and System Administrators have the ability to view all tasks for all members of the project team from this link by clicking the “Show All Tasks For All Users” checkbox above the Tasks List window.
- The “Info”  button will display all of the project's information, including a roster of all of the project team members, the groups they are assigned to and the levels of permission they have. *Many of these fields will be left blank, as this is a screen that is also used by the Montgomery County Planning Department for their project review process.*
- The “Notes”  button allows you to add and share notes with other project team members. These notes are not distributed beyond the notes page.
- The “Email”  button allows you to send e-mails to individual members of the project team, several people within the team, or the entire project team.
- The “Edit”  button allows Project Managers to add or remove people from groups and to change users' permissions within a project.



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Project Name – The name of the project is always provided at the top of the screen, making sure you are always aware which project you are working in.

Reports Tab – The reports list allows you to generate several types of reports for a project. See the [Reporting](#) section for more information about reports.

Project Info Tab – Basic project information, entered by the Project Manager, is provided here. For most projects, many of these fields will be blank, as the information does not apply to Parks. Details about this tab are provided in the [Project Startup](#) task.

Project Files – The project files section of ePlans functions much like the folders in Windows Explorer. Click on the “+” button at the left to see a list of the subfolders contained in each folder. Click on a folder’s name to view the files inside. The text (in parentheses) to the right of each folder name indicates how many files are inside each folder and how many of those files were recently added (folders without any text are empty). If you click on an empty folder, a screen will appear telling you that no files currently exist in that folder. You can return to the previous folder structure by clicking the “View Folders” button or you can upload files by following the instructions on the screen. *All files to be reviewed should be uploaded into the “Current Submissions” folder at the top of the file structure.*

The screenshot displays a hierarchical folder structure for project 2013 0103. The folders listed are: Current Submissions, Documents, Drawings, Rendering (1 Files - 1 New), Concept (Up to 30 Percent) Design (5 Files - 5 New), Detailed (30 to 90 Percent) Design, Final (90+ Percent) Design (QAP), Bid Documents, As-Built Plans, NRI-FSD, FCP, SWM and Erosions and Sediment Control Plans, Other Designs, Project Permits Folder, Photos, Procurement and Contract, Project Correspondence, Uploads, and ChangeMarkReports. Red callout boxes on the left provide the following explanations:

- Project Number**: Points to the project ID "2013 0103".
- Current Submissions Folder (click to view files)**: Points to the "Current Submissions" folder.
- Number of Files in Folder**: Points to the "(1 Files - 1 New)" text next to the "Rendering" folder.
- Number of New Files in Folder**: Points to the "- 1 New" text next to the "Rendering" folder.
- + Button (click to expand)**: Points to the "+" icon next to the "Rendering" folder.
- Folder name (click hyperlink to access)**: Points to the "Rendering" folder name.



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WORKFLOWS



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WORKFLOWS: Applicant



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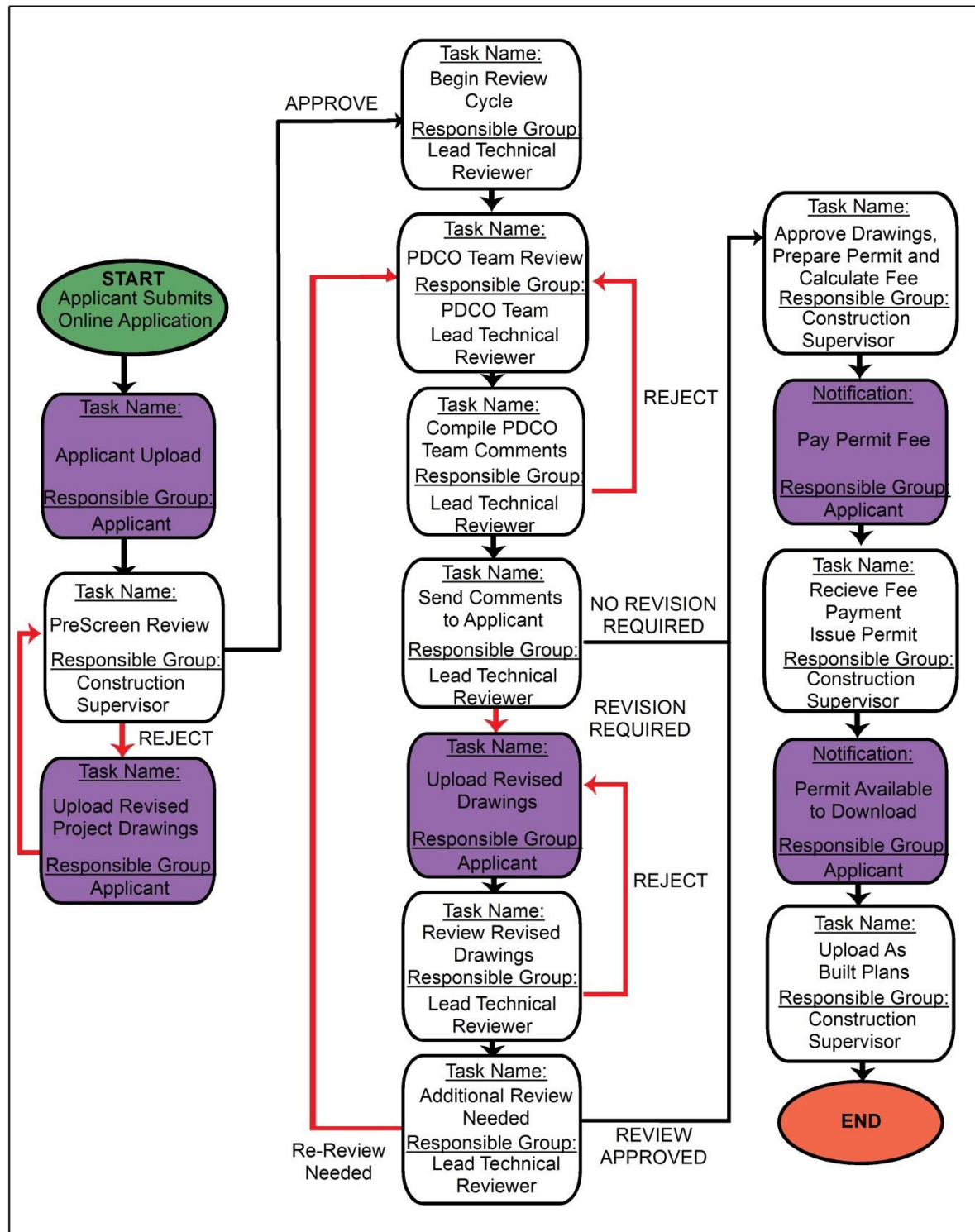
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Workflow

This section describes all of the Applicant's tasks within the Workflow.





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Task Name: Fill out Application

Before an applicant is issued a Park Construction Permit, the applicant must fill out the necessary information using an online application. Below are the link and a screenshot of the application:

<https://eplans.montgomeryplanning.org/ProjectDox/WorkflowEForms/ConstructionPermit.aspx>

Application for Park Construction Permit

Montgomery Department of Parks, Park Development Division
9500 Brunett Avenue, Silver Spring, Maryland 20901

For additional information on filling out this form please click on the following: <https://www.parkprojects.org/xx>

Please note that this form cannot be saved and must be filled out in one sitting. All fields with a red asterisk are required and must be filled out. If a field is not applicable, please enter "NA".

Project Name * SCO Parks Permit Testing

Is this an amendment of an existing permit? * ☐ Yes ☒ No

If yes, enter the permit number [Retrieve Original Permit Information](#)

Affected Park *
D27 - CLEARSPRING LOCAL PARK
D28 - COVINGTON LOCAL PARK
D29 - COLESVILLE LOCAL PARK
F02 - COLUMBIA LOCAL PARK
F03 - CONROD LOCAL PARK
E74 - CROSS CREEK CLUB LOCAL PARK
D31 - DARNESTOWN LOCAL PARK
D32 - DEWEY LOCAL PARK
D33 - DICKERSON LOCAL PARK
D34 - DUFFIE LOCAL PARK

Description of Proposed Work *

Natural Resources Impacts *

Acres of Disturbed Park area * 500

Watershed Name * Broad Run **Watershed Class *** Use I

For more information on Watersheds, please visit <http://www.parkprojects.org/xx> or call Parks staff at xxx-xxx-xxxx.

Is this in a Special Protection Area (SPA)? * ☐ Yes ☒ No

If yes, Enter SPA name

Approved Forest Conservation Plan OR Exemption Number 123123

Subdivision/Property Name * 234234

Preliminary Plan Number * 345345 **Site Plan Number *** 456456

Anticipated Construction Date * February 2015

Have you had previous contact with Parks staff regarding this project? * ☐ Yes ☒ No

If yes, enter the Staff Name **and Date of most recent contact ***

Applicant Info

Company * Applicant Company

Primary Contact

First Name * Sharleen Applicant **Last Name *** Co

Email * whicker25@gmail.com **Phone *** 123-1231

Address 1 * Applicant Address

Address 2 *

City * Applicant City

State * LA **Zip *** 123123

Consultant Info

Company * Consultant Company

Primary Contact

First Name * Sharleen Avolve **Last Name *** Co

Email * sco@avolvesoftware.com **Phone *** 234-2342

Address 1 * Consultant Address

Address 2 *

City * Consultant City

State * DE **Zip *** 543245

To be read and signed by applicant

By checking the box below and typing my name below, I declare and affirm, under penalty of perjury, that to the best of my knowledge, information and belief all matters and facts in this application are correct. I declare that I am the owner of the property or duly authorized to make this application on behalf of the owner. I agree to be bound by the terms and conditions of the Park Permit.

☒ I agree with the statement above Sharleen Co

When finished filling out form, click "Submit"

For additional information on filling out this form please click on the following: <https://www.parkprojects.org/xx>

NOTE: After you submit the form, you will receive an invitation email for the project. If you do not receive an email within 24 hours of submission, please contact us at XXXX.

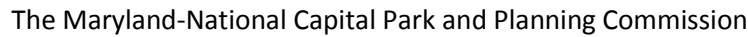
1. The applicant should reference the Park Construction Permits Procedure document for more instructions before filling out the application. The hyperlink for the form can be found at the top and bottom of the application. *The hyperlinks are highlighted in red in the graphic above.*



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2. The applicant must fill out all the fields with the red asterisk (*)
3. Type their full name in the “I agree with the statement above” field and click the “Submit” button to create a project in ePlans.



Task Name: Applicant Upload

4. A new task will appear in your Task List. Click on the link entitled “ApplicantUpload.”
5. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm.
6. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
7. To upload project files, click on the link entitled “Click to Access Project.” This will take you to the Project’s file structure. *The file structure list also appears at the left side of the screen in the project’s Main Page. See the File Management section of this guide for more detail about file organization.*

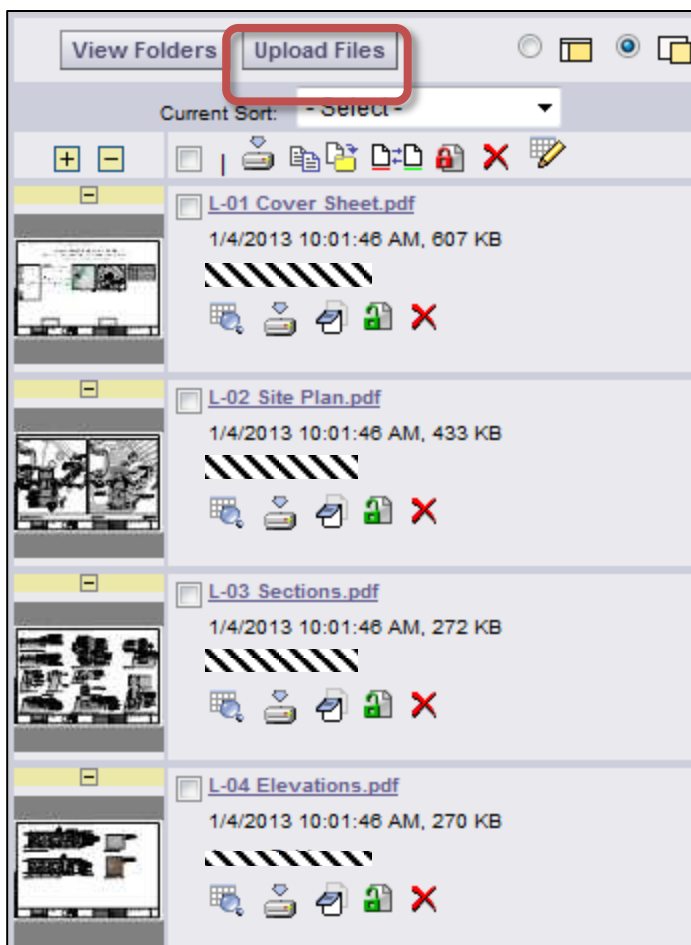
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8. Click on the destination folder to which you would like to upload files. *Unless the Lead Technical Reviewer directs you to do otherwise, submission drawings should always be uploaded to the Current Submissions Folder.*
9. Click on the “Upload Files” button, and a new window will open allowing you to select files to upload. *If the folder you selected is empty, a set of instructions for uploading files will appear on your screen. If there are already files in the folder you selected, click the “Upload Files” button at the top of the screen.*





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Drag-n-Drop files or folders.

Files (6)	Size (1,930KB)
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-01 Cover Sheet.pdf	577,674 bytes
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-02 Layout.pdf	198,145 bytes
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-03 Grading.pdf	320,075 bytes
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-04 Details.pdf	299,008 bytes
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-05 Details.pdf	323,292 bytes
P:\PROJECTS\1PDD_Seneca Lodge Tent Pad\Project Correspondence\Major Deliverables\2012 0925 - 100%\L-06 Planting.pdf	258,554 bytes

Select Files | Select Folders | Upload URL | Upload Now

10. Click the "Select Files" button. A Windows Explorer window will open. *You can also drag files directly from Windows Explorer into the Files to be Uploaded Box.*
11. Find the files that you want to upload from your computer or local server drive onto ePlans. Highlight the desired files and click "Open." *Hold down the "Control" key to select multiple files.*
12. Click the "Upload Now" button to upload the files.
13. Once you are finished uploading project files, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Task List (see step 1).*
14. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
15. You are now finished with this task, and it will disappear from your Task List.
16. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 8 through 12 above.



Task Name: Upload Revised Project Drawings (Following PreScreen Review)

The Construction Supervisor will review the drawings you uploaded to make sure they are ready to be sent to the PDCO Team for their review. If the Construction Supervisor finds any issues that will prevent a complete PDCO Team review, he or she will reject the drawings and request that you revise your drawings and upload them again. If your drawings are approved on the first submission, you will skip this task.

1. A new task will appear in your Task List. Click on the link entitled "UploadRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. The "Task Instructions" section of the eForm will contain comments from the Lead Technical Reviewer about what revisions you need to make.
5. Make sure the file names of your revised drawings are identical to the original drawings. This will enable versioning, which allows users to overlay multiple files of the same name on top of each other to see changes from version to version. *Keeping identical file names does not overwrite older files with newer ones; a copy of the original file will still exist in ePlans.*
6. To upload project files, click on the link entitled "Click to Access Project." This will take you back to the project's Main Page. Follow the instructions in the Upload Project Drawings task to upload your revised drawings.

The screenshot shows the MontgomeryParks.org eForm interface. The header includes the Montgomery Parks logo and the text "THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION". Below the header, there are links: "Click Here to Save Eform as PDF..." and "Click Here to Generate Application Form PDF...". The main content area has a navigation bar with tabs: "Review Information", "Permit Information", "Contact Information", "Resources", "Checklist Report (0)", and "Routing Slip". The "Review Information" tab is active, showing fields for "Review Coordinator", "Review Cycle", "Workflow/Activity Name", "Activity Instructions", and "Current User Logon". The "Activity Instructions" section is highlighted with a red box and an arrow pointing to it from the "Activity Instructions" label. Below this, there is a "Task Instructions" section with a red box and an arrow pointing to it from the "Task Instructions" label. The "Applicant Notes" section is also highlighted with a red box and an arrow pointing to it from the "Applicant Notes" label. The "Corrected Documents Checkbox" is highlighted with a red box and an arrow pointing to it from the "Corrected Documents Checkbox" label. The "Corrections Complete" section is highlighted with a red box and an arrow pointing to it from the "Corrections Complete" label. The "Save and Close" button is highlighted with a red box and an arrow pointing to it from the "Save and Close" label. The footer of the form says "Best in Class Version 1.0".

Activity Instructions

Applicant Notes

Corrected Documents Checkbox

Corrections Complete

Save and Close



Montgomery Parks

7. Return to the eForm and click the checkbox entitled “I have uploaded the corrected documents and/or drawings as indicated below.”
8. Add any additional comments or notes in the Applicant Notes Field.
9. Click the “Complete” button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click “OK.” *If you want to leave ePlans and finish this task later, click the “Save and Close” button.*
10. You are now finished with this task, and it will disappear from your Task List. This task will be repeated as necessary until the Lead Technical Reviewer approves the drawings for review by the PDCO Team.
11. You can upload additional files at any time by going to the folder list at the left side of the project’s Main Page and following steps 8 through 12 in the Upload Project Drawings task.



Task Name: Upload Revised Drawings (Following PDCO Review)

Once the Lead Technical Reviewer reviews and complies all of the PDCO Team comments, you will receive an e-mail notifying you that revisions need to be made to the drawings if necessary. The Lead Technical Reviewer will also provide you with a Resubmit Due Date.

1. A new task will appear in your Task List. Click on the link entitled "UploadRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Click on the "Project File Markups" tab at the top of the screen to see a list of every changemark made on the drawing.
5. Respond to each changemark by entering a note in the "Response" field for that changemark.

The screenshot shows the 'Project File Markups' tab in a web application. The interface includes a navigation bar with tabs: Review Info, Project Info, Contact Info, Status, and Project File Markups. Below the tabs is a 'Project File Markups' section with a 'Filter by Group' dropdown and links for 'Refresh Changemarks...' and 'Publish to PDF'. A table lists three changemarks with columns: Resolved, File, Cycle, Group, File, Markup, Description, Details, and Response. Each row includes a thumbnail of the drawing, a 'No' button, and a 'Response' field. A 'Save Changemark Updates' button is at the bottom, with checkboxes for 'Show My Changemarks' and 'Show All Changemarks for All Cycles'. Red arrows point from text boxes to the 'Project File Markups' tab, the 'Response' field, and the 'Save Changemark Updates' button.

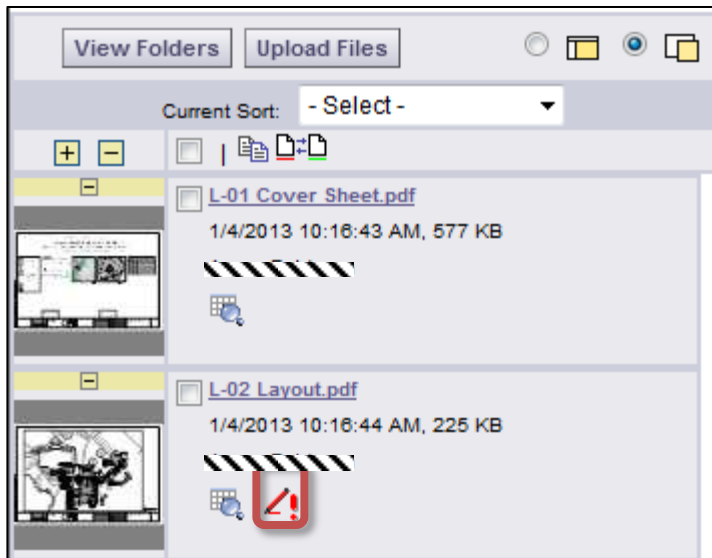
Resolved	File	Cycle	Group	File	Markup	Description	Details	Response
<input type="button" value="No"/>		1	PDCO Group	L-02 Layout.pdf		AF 01	Remove parking lot improvements from this set.	<input type="text" value="Will revise"/>
<input type="button" value="No"/>		1	PDCO Group	L-02 Layout.pdf		AF 02	Extend the wall all the way across	<input type="text"/>
<input type="button" value="No"/>		1	PDCO Group	L-06 Planting.pdf		AFG 01	Extend shrubs to meet existing.	<input type="text"/>


Be sure to respond to all changemarks, even if the response is as simple as "will comply." This lets the Lead Technical Reviewer know that you have reviewed and considered every changemark.

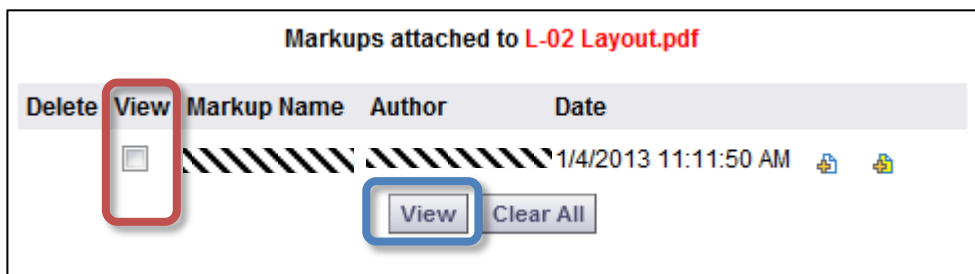


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- You can view changemarks within the context of an entire drawing by navigating back to the project's Main Page and selecting the folder to which your drawings are saved. *Do not close the eForm while you are viewing changemarks; it may be helpful to toggle back and forth between the two screens.*



- If changemarks exist within a drawing, the “Markups” icon  will appear below the file name. Click on the “Markups” icon, and the View Markup Screen will appear.
- To view changemarks, click on the “View” box for each markup name you would like to see. You can view as many or as few changemarks at the same time as you would like.
- Once you have selected the changemarks you want to view, click the “View” button. The drawing and all of its changemarks will appear in the Brava Viewer. *Here, you can use the toolbar at the bottom of the screen to pan and zoom to areas of the drawing. You can also click on individual changemarks to see the text of each.*



- After reviewing and responding to all of the changemarks click the “Save Changemark Updates” button in the Project File Markups Screen of the eForm and click the “Review Info” tab at the top of the screen.
- After making all of the necessary revisions to your drawings, make sure the file names of your revised drawings are identical to the original drawings. This will enable versioning, which allows users to overlay multiple files of the same name on top of each other to see changes from version to version. *Keeping identical file names does not overwrite older files with newer ones; a copy of the original file will still exist in ePlans.*



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12. Upload your revised drawings by following the instructions in the [Upload Project Drawings](#) task.
13. Type any additional comments or general notes to the Lead Technical Reviewer in the Applicant Notes Field, and make sure to read the checkbox statements and check each box.
14. Click the “Complete” button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click “OK.” *If you want to leave ePlans and finish this task later, click the “Save and Close” button.*
15. You are now finished with this task, and it will disappear from your Task List. This task will be repeated as necessary until the Lead Technical Reviewer accepts the drawings.

The screenshot shows a web form titled "DEPARTMENT REVIEW - Review Cycle: 1". It contains a table with two rows of review data. Below the table is a section for "Applicant Notes" with two checkboxes and a text area. At the bottom are "Complete" and "Save And Close" buttons. Red arrows point from text boxes on the right to specific elements in the form.

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	LEAD TECHNICAL REVIEWER	<div>CORRECTIONS REQUIRED</div> <div>New Title</div> <div><input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE</div>
<input checked="" type="checkbox"/>	1	PDCC GROUP	<div>CORRECTIONS REQUIRED</div> <div>Need some work</div> <div><input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE</div>

Task Instructions

Applicant Notes

☐ I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.

☐ I have uploaded the revised drawings into the "Current Submission" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

Annotations:

- Applicant Notes (points to the text area)
- Checkbox Statements (points to the checkboxes)
- Complete (points to the Complete button)
- Save and Close (points to the Save And Close button)



The Maryland-National Capital Park and Planning Commission

Montgomery Parks

Notification: Pay Permit Fee

At this step, the Applicant will receive an email with the fee of the permit and the contact information of the Construction Supervisor. Calculate the Fee Amount and Bond Amount from the email and contact the Construction Supervisor to get further instruction for payment. Below is a email notification sample:



Fee Payment Task Assignment

Attention Test:

Your plan review submission for Project: **2014-038** has been reviewed and is approved. However, you will need to pay a fee of **\$50** and a bond amount of **\$100** before the permit can be issued.

Please contact the [Construction Supervisor](#) to pay the fee.

Please do not reply to this email.



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Notification: Permit Available to Download

At this step, the Applicant will be able to download the stamped drawings and the Park Construction Permit.

1. You will receive an email notification stating the applicant can now download the stamped drawings and permit from eplans. *Sample of notification is below:*

eplans
MontgomeryPlanning

New Batch File Stamp Notification

One or more files have been batch stamped and added to the project listed below.

Project:	2014-038
Path:	2014-038\Project Permits Folder\Park Construction Permit
Stamped by:	[Signature]

[Stamped Files Access](#) | [Login to ProjectDox](#)

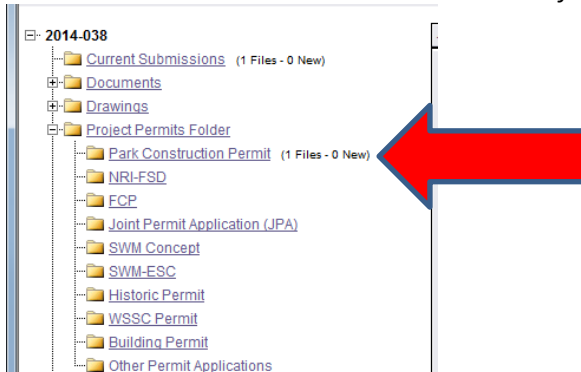
Original files that were stamped:

- 1. [L-01 Cover Sheet.pdf](#)

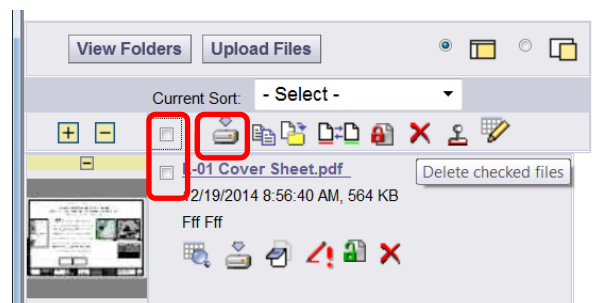
Hassan Symes sent this notification to you - it was not automatically sent by the ePlans DEV 8.3 system. If you no longer wish to receive notifications of this type, you will need to contact Hassan Symes by sending an email to hassan.symes@montgomeryparks.org or the project administrator.

If you do not have access to the specified folder, please contact the Project Administrator.

2. You will then login into to eplans
3. Click on the project number and that will navigate you to the folder structure of the project.
4. You will then navigate to the “Park Construction Permit” folder under the “Project Permit Folder.” *Red arrow below shows the location of the folder in the hierarchy.*



5. You will check all the documents that you wish to download in the folder and click on the download button to save them to your computer. This concludes the task. *The check box and download button are highlighted below:*





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OTHER FUNCTIONS



The Maryland-National Capital Park and Planning Commission

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Folder Management

The ePlans platform is designed to be a secure, online location to store drawings, reports, correspondence and other project-specific documentation. A default file organization tree has been set up within the “PARKS – Project” template. While this folder structure is standard to the Park Development Division and every effort should be made to adhere to these standards, the folder structure can be modified at any point during a project by the Project Manager.

1. To edit a project’s folder structure, click the “Edit” button in the Main Tool Bar of the project’s Main Screen. Click the “Folders” tab at the top of the screen.

2. To modify individual folders, use the icons to the right of the folder name.
 - Click the “Delete” icon to delete a folder and all of its contents.
 - Click the “View Permissions” icon to changes which users have access to view, modify or add to a folder.
 - Click the “Rename” icon to rename the folder.
3. To change the order folders are viewed in the project’s Main Page, click and drag the folder you wish to move to the location you wish to move it to. Click the “Save Folder Order” button when you are finished organizing folders. *During the design review phase of a project, the “Current Submissions” is the most commonly accessed folder by all users, which is why its default location is at the top.*
4. To create a new folder, click the “Add Folder” link.



Montgomery Parks

File Management

Once a phase of a project is complete, you may want to create record sets of Consultant submissions or move older, working files to archive folders. Instead of downloading and uploading files to your computer, this can all be accomplished within the ePlans platform. Project Managers have the ability to move or copy files anywhere within their project and can set permissions for other users to move or copy files to any location or to specific folders.

The screenshot displays the ePlans File Management interface. At the top, there are buttons for 'View Folders' and 'Upload Files'. Below these is a 'Current Sort: - Select -' dropdown menu. A toolbar contains icons for file management actions: a plus sign, a minus sign, a download icon, a copy icon, a move icon, a lock icon, a delete icon, and a grid icon. The main area lists several files, each with a thumbnail, a checkbox, a filename, a timestamp, a size, and a user name. The files are:




- ☒ [L-01 Cover Sheet.pdf V2](#)
1/4/2013 11:40:42 AM, 577 KB
Aaron
- ☒ [L-02 Layout.pdf V2](#)
1/4/2013 11:40:43 AM, 198 KB
Aaron
- ☒ [L-03 Grading.pdf V2](#)
1/4/2013 11:40:43 AM, 320 KB
Aaron
- ☒ [L-04 Details.pdf V2](#)
1/4/2013 11:40:43 AM, 299 KB
Aaron
- ☒ [L-05 Details.pdf V2](#)
1/4/2013 11:40:44 AM, 323 KB
Aaron
- ☒ [L-06 Planting.pdf V2](#)
1/4/2013 11:40:44 AM, 258 KB
Aaron

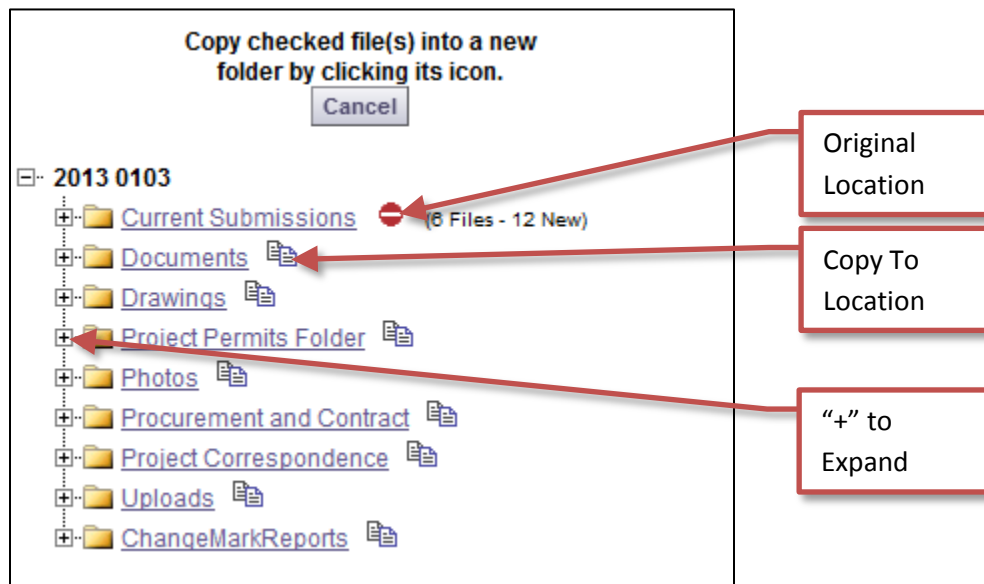
Red callout boxes with arrows point to specific elements:

- Download Files**: Points to the download icon in the toolbar.
- Copy Files**: Points to the copy icon in the toolbar.
- Move Files**: Points to the move icon in the toolbar.
- File Checkbox**: Points to the checkbox next to the first file, 'L-01 Cover Sheet.pdf V2'.



Montgomery Parks

1. On the left side of the project's Main Page, navigate to the files you want to move by clicking the folder in which they are located.
2. Select the files you wish to move by clicking the checkbox next to the file's name.
3. Select the action you wish to perform.
 - To copy the selected files to another folder, click the "Copy"  icon at the top menu bar. A message will appear asking if you would like to continue. Click the "OK" button.
 - To move the selected files to another folder, click the "Move"  icon. A message will appear asking if you would like to continue. Click the "OK" button.
 - To download the selected files to your computer, click the "Download"  icon. A message will appear asking if you want to open or save the file. Click the "Open" button to view the file in Adobe Acrobat. Click the "Save" button to save the file to your computer. *Files should be downloaded when you want to view them from a location without internet access (such as on-site). Remember that any changes made to downloaded files will not appear in ePlans unless you re-upload the modified files.*
4. The File Preview Pane at the left side of your screen will be replaced by a new folder tree. Click on the "Copy" or "Move" icon next to the folder you wish to move the file to. Click the "+" button to expand a folder and view its subfolders.

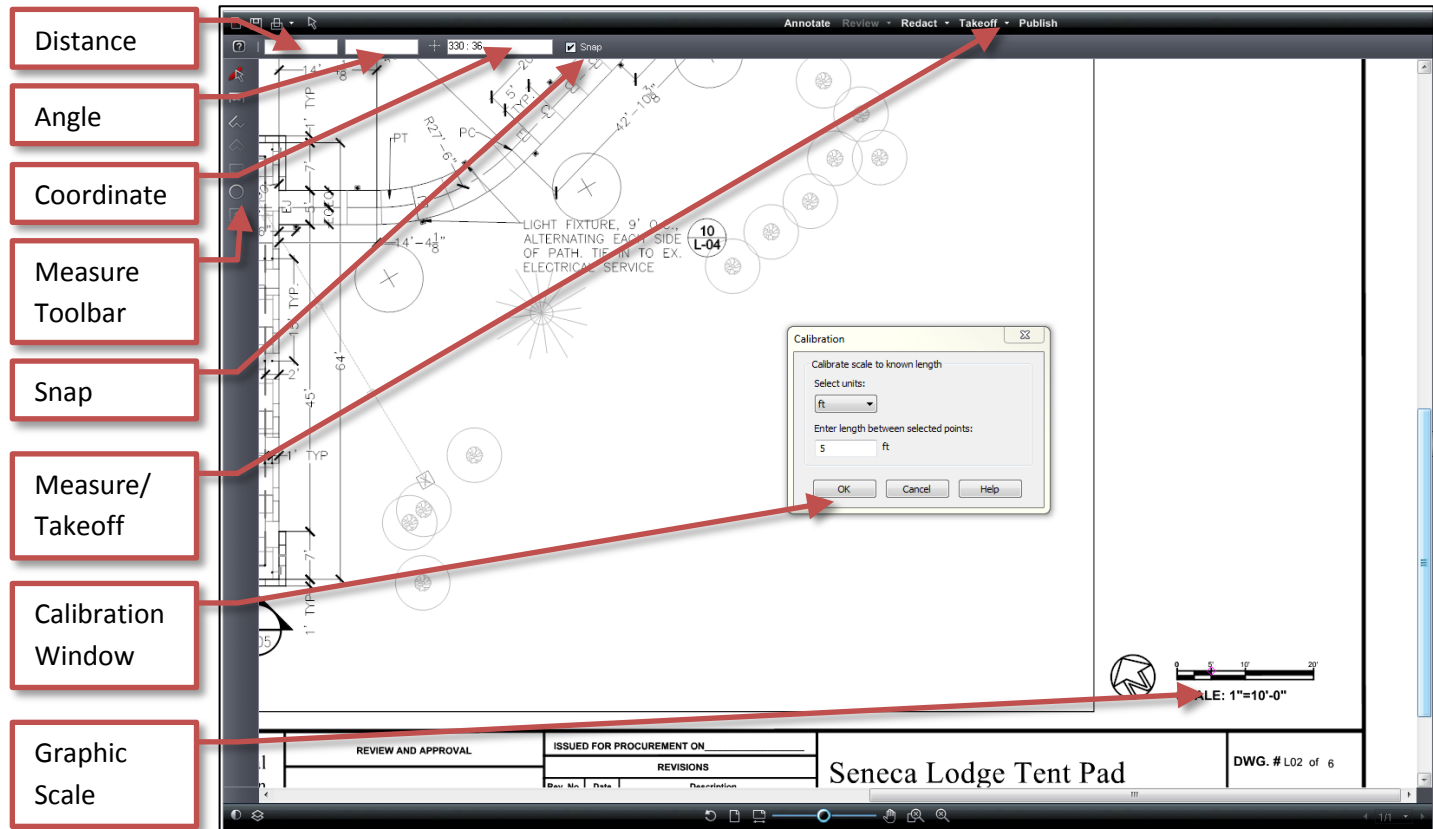



5. A message will appear at the top of the screen indicating that the action was successful.



Measure Tools

The Brava Viewer allows users to take accurate measurements from scaled drawings right on the computer screen. The measure tool can be calibrated to any drawing scale, automatically calculating real-world distances from scaled drawings.



1. Open a drawing in the Brava Viewer by clicking its thumbnail in the Project File List.
2. Zoom to the drawing's graphic scale. If no graphic scale exists, zoom to a known dimension.
3. Click the small arrow  button to the right of the "Measure" or "Takeoff" link at the top of the Brava Viewer, and select "Calibrate..." from the drop down menu.
4. Make sure the "Snap" checkbox is checked.
5. Place your cursor at the "0" hash mark of the graphic scale and click once. *If no graphic scale exists, use the beginning point of a known dimension.*
6. Place your cursor at the next hash mark of the graphic scale and click once. *If no graphic scale exists, use the end point of a known dimension.*
7. Select the units you wish to use from the "Select units" drop down menu.
8. Type in the dimension of the line you just traced and click "OK" to calibrate the drawing.
9. Click the small arrow button at the top of the Brava Viewer and select "Measure" from the drop down menu. Use the Measure Toolbar at the left side of the screen to measure elements in the drawing. Hold your cursor over each button in the tool bar to see that button's function.



Takeoff Tools

The Brava Viewer has the ability to count the number, length or area of several different elements at once, keeping a separate tally of everything measured. This feature is particularly useful when creating cost estimates, determining quantities of materials to order or verifying whether proposed work falls within required limits.

Measure/ Takeoff

Total Count

Takeoff Menu

Categories List

Takeoff Checkmarks

Measure Toolbar

Calibration Window

1. Open a drawing in the Brava Viewer by clicking its thumbnail in the Project File List.
2. Zoom to the drawing's graphic scale. If no graphic scale exists, zoom to a known dimension.
3. Click the small arrow button to the right of the "Measure" or "Takeoff" link at the top of the Brava Viewer, and select "Calibrate..." from the drop down menu.
4. Make sure the "Snap" checkbox is checked.
5. Place your cursor at the "0" hash mark of the graphic scale and click once. *If no graphic scale exists, use the beginning point of a known dimension.*
6. Place your cursor at the next hash mark of the graphic scale and click once. *If no graphic scale exists, use the end point of a known dimension.*
7. Select the units you wish to use from the "Select units" drop down menu.
8. Type in the dimension of the line you just traced and click "OK" to calibrate the drawing.
9. Click the small arrow button again and select "Takeoff" from the drop down menu.
10. Click the "New" link in the Takeoff Menu at the right side of the screen. The Takeoff Category Window will appear.



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The screenshot shows a software dialog box titled "Takeoff Category". It has a close button (X) in the top right corner. The dialog is divided into three sections: "Category", "Measurement Type", and "Unit System". In the "Category" section, the "Name" field contains the text "Mulch Beds" and the "Color" field shows a yellow square. In the "Measurement Type" section, there are three radio buttons: "Length", "Area" (which is selected), and "Count". In the "Unit System" section, there is a dropdown menu set to "English", and below it, "Unit" is set to "in" and "Precision" is set to "0.1". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help". The "OK" button is highlighted with a red rectangular border.

11. In the "Name" field, enter the type of element you want to count.
12. Select the color you wish to use. *You may want to differentiate between separate elements or materials by assigning a different color to each.*
13. Select the Measurement Type you want to use. The appropriate buttons in the Measure Toolbar will become active, depending on which Measurement Type you select.

Length – Calculate the overall length of a specific element or material. This is helpful in calculating the total linear footage of fencing or piping.

Area – Calculate the total area of a space or material. This is helpful in calculating the total square footage of various paving types, seed mixes required for lawn or forest cover.




Count – Tally the quantity of a certain type of element or feature. This is helpful in counting parking spaces or individual plants. Select your preferred Unit System, Unit, and Level of Precision from the dropdown menus.




14. Click the "OK" button. Repeat steps 10 through 14 for each element you want to count. *Your level of specificity should depend on the level of completion the documentation has reached. For instance, create separate categories for trees and shrubs if that is what is identified on a landscape plan. If a detailed plant schedule has been provided, you may want to create a separate category for each type of vegetation to confirm the consultant's plant counts are accurate.*





Montgomery Parks

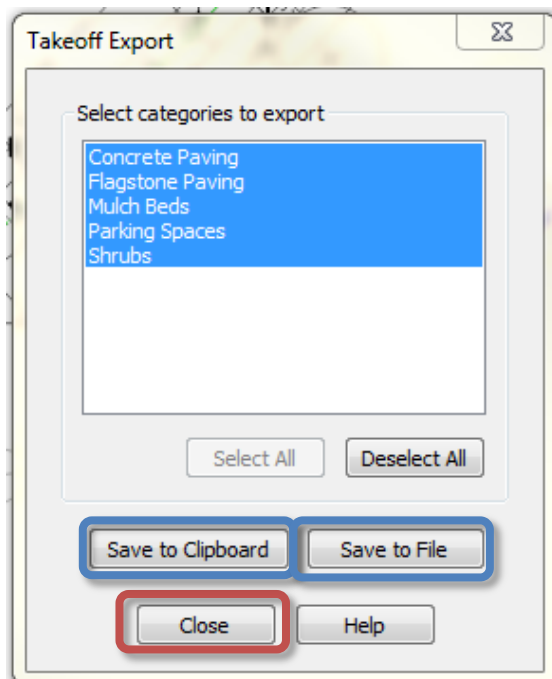
15. Begin calculating quantity takeoffs by highlighting from the Categories List the category of element you want to count. The appropriate buttons in the Measure Toolbar will become active, depending on which Measurement Type you selected when you created that category.

Length –You can use the “Measure Line”  button, the “Measure Polyline”  button or the “Measure Circle”  button to calculate length. Trace any line of which you want to calculate the length by clicking on each midpoint of that line. Hit the “Enter” key to stop calculating a line. The Total Count Field at the top of the Categories List will keep track of the length of all lines measured within the highlighted category.

Area – You can use the “Measure Polygon”  button, the “Measure Rectangle”  button or the “Measure Circle”  button to calculate areas. Trace the outline of any shape that you want to calculate by clicking on each point of that shape. Hit the “Enter” key to close the shape and calculate the area. The Total Count Field at the top of the Categories List will keep track of the total area of all shapes measured within the highlighted category.

Count – Use the “Measure Count”  button to place a checkmark  on top of each item you want to count. The Total Count Field at the top of the Categories List will keep track of the total number of checkmarks placed within the highlighted category.

16. To save quantity takeoffs as a spreadsheet or text file, click the “Export” link in the Takeoff Menu. The Takeoff Export window will appear.





Montgomery Parks

17. Select the Categories you would like to export. *Hold the “Ctrl” key down and click to select multiple categories. Alternately, click the “Select All” button to export all categories.*

18. Determine the format to which you want to save your data.


Save to Clipboard – This will copy each category and quantity as a string of text. You can paste this information directly into the text of an email, or into a word processing document.

```
"Concrete Paving", 125.6 , ft
"Flagstone Paving", 2755.4, sq. ft
"Mulch Beds", 0.0, sq. in
"Parking Spaces", 11, count
"Shrubs", 7, count
```

Save to File – This will save a comma separated value (.csv) file that can be opened in a spreadsheet program, such as Microsoft Excel.

	A	B	C
1	Concrete Paving	125.6	ft
2	Flagstone Paving	2755.4	sq. ft
3	Mulch Beds	0	sq. in
4	Parking Spaces	11	count
5	Shrubs	7	count

19. When you have finished exporting data, click the “Close” button on the Takeoff Export Window.

20. To save all of the takeoffs you have calculated, click the “Save As”  button at the top left corner of the Brava Viewer. Enter your name in the Save As Window that appears and click “OK.”

21. To return to a Takeoff file you previously saved, open the drawing in the Brava Viewer and click the “Review” link at the top of the Brava Viewer. Select the file name you want to view and click

“OK.” Click the “Takeoff”  tab at the top of the Takeoff Menu.



Reporting

Any time a user performs an action in ePlans, a record of that action is saved to the ePlans server. Using this information, ePlans users can generate a number of different reports to find out various activities occurring in their projects. Reports are available in two places. Reports about project user activity are available through the project's Main Page. Reports of actions taken within a workflow are available below the Task List.

1. For reports about project user activity, go to the project's Main Page and click the "Reports" tab next to the "Project Info" tab at the top of the screen. A list of all of the available reports for that project will appear, along with a brief description of each report.

2013 0103

Main Contact: Seneca Lodge Tent Pad

Project Info **Reports**

Available reports:

Name:	Project Name:
Current Project - Project Markups Listing	Current Project all file markups report
Current Project - All Emails Sent Detailed Report	Current Project all emails sent detail report
Current Project - All Emails Sent Summary Report	Current Project all emails sent summary report
Current Project - All Files Report	Current Project all uploaded files report
Current Project - All Project Users	Current Project all users in Project
Current Project - All Uploaded Files with Sheet Sizes	Current Project all uploaded files with sheet size calculations
Current Project - Entered (last 30 days)	Current Project entered in last 30 days
Current Project - Entered (last 7 days)	Current Project Entered in last 7 days
Current Project - Folders Entered (last 30 days)	Current Project folders entered in last 30 days
Current Project - Folders Entered (last 7 days)	Current Project folders entered in last 7 days
Workflow - Checklist Report	Workflow reviewer selected checklist comments and status report

Page 1 of 1 (11 items)

2. Click the report you wish to generate. The report will appear in a new window. Click the column titles to sort the report entries by that title.

Current Project - Project Markups Listing

Current Project all file markups report

Print

Project Name	Markup Name	Markup Text	Markup Date	File Name	First Name	Last Name	Email Address
2013 0103	Aaron	Remove parking lot improvements from this set.	1/4/2013 11:11:50 AM	L-02 Layout.pdf	Aaron		aaron. @montgomeryparks.org
2013 0103	Aaron	Extend the wall all the way across	1/4/2013 11:11:50 AM	L-02 Layout.pdf	Aaron		aaron. @montgomeryparks.org
2013 0103	Aaron		1/4/2013 11:11:50 AM	L-02 Layout.pdf	Aaron		aaron. @montgomeryparks.org
2013 0103	Aaron	Extend shrubs to meet existing.	1/4/2013 11:12:28 AM	L-06 Planting.pdf	Aaron		aaron. @montgomeryparks.org
2013 0103	Aaron		1/4/2013 11:12:28 AM	L-06 Planting.pdf	Aaron		aaron. @montgomeryparks.org

Page 1 of 1 (6 items)

Export Options:

Show Column Titles: ☒ Show Grid Lines: ☒ Column Titles Forecolor: White Alternating Row Color: Grey Column Titles Backcolor: Blue File Type: XLS

Download Report Data

Print

Column Titles

Export Options

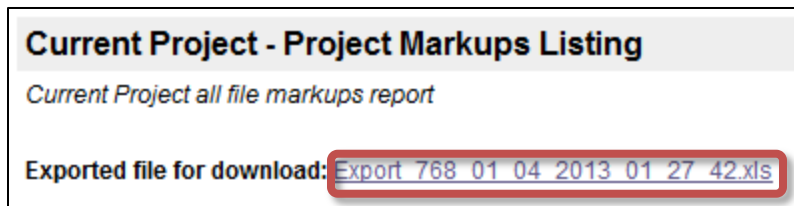
Download Report Data

File Type

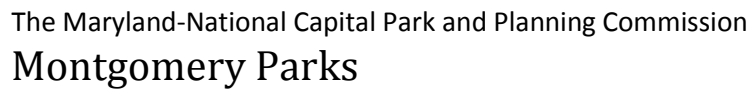


Montgomery Parks

3. You can print a hard copy of the report by clicking the “Print” button at the top right of the screen.
4. You can save the report to your computer in a number of different file types, depending on how you plan to use the data. Start by customizing the report’s appearance using the checkboxes and pull down menus in the “Export Options.” At the far right of the Export Options, you can choose which file type you want to create.
 - CSV: Comma separated value
 - DOC: Microsoft Word document
 - HTML: Internet-ready document
 - MS Office XML: Microsoft Office Extensible Markup Language
 - XLS: Microsoft Excel spreadsheet
 - XML: Extensible Markup Language
5. Once you have selected your Export Options, click the “Download Report Data” button. A new window will appear with a link to the report for you to download. Click the link to open it or to save it.



6. For Workflow reports, click the “Tasks List” button on the Main Tool Bar of a project’s Main Page. The bottom of the page will list all of the Workflow reports that are available for this project (see screen shot on the next page).
7. Click the report you wish to generate and follow steps 2 through 6 above.




Page 51 of 79



Montgomery Parks

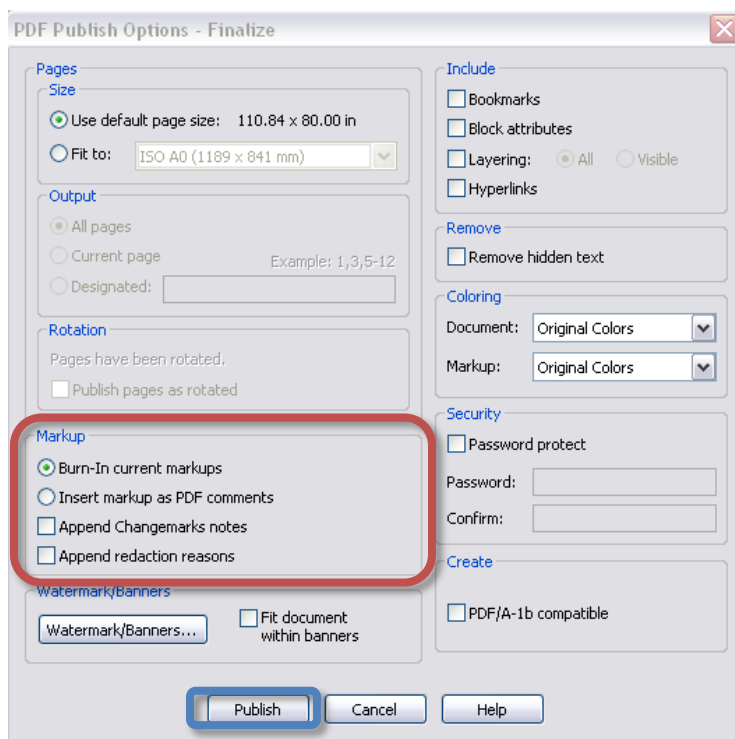
Publishing Changemarks

After each PDCO Team Review cycle, you may want to save a record copy of all the changemarks made on the Consultant's drawings. ePlans allows you to save changemarks embedded within a drawing, or as a comprehensive list, organized in an Excel spreadsheet.

1. To save changemarks embedded within a drawing, use the folder list on the left side of the project's Main Page to navigate to the drawing you wish to publish. Click the "Markups"  icon and select which changemarks you wish to view. Click the "View/Edit" button to open the Brava Viewer.
2. Click on the "Publish" link at the top of the screen and select the "Publish to PDF" option.
3. A dialog box will appear offering a number of options for publishing the drawing. You do not need to change any of the settings in this dialog box if you do not want to. One section to consider, however, is the Markup Menu.

Burn-In current markups: This setting will insert all of the open changemarks as a layer in the drawing. The changemarks are not editable using this feature.

Insert markup as PDF comments: This setting converts all of the files changemarks to Adobe PDF comments, allowing you to manipulate them as you would in Adobe Acrobat.




4. Click the "Publish" button. A message will pop up asking if you want to "Save to file" or "Email as attachment." Select "Save to file" and click the "OK" button.



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Montgomery Parks

- 5. A Windows Explorer screen will appear. Navigate to the location on your computer where you want to save the drawing to and click the “Save” button.
- 6. To save changemarks as a list, click the “Project File Markups” tab of any eForm.
- 7. To create a PDF document, Click on the “Publish to PDF” link at the top of the changemarks list.

To export all of the changemarks to an Excel spreadsheet, click the Microsoft Excel  logo at the bottom of the changemarks list.

Project Construction Plans - 50% Review - PARKS REVIEW

Review Info

Project Info

Contact Info







Status

Project File Markups

Project File Markups

Filter by Group:


[Refresh Changemarks...](#) [Publish to PDF](#)

Resolved	File	Cycle	Group	File	Markup	Description	Details	Response
<div>No</div>		1	PDCO Group	L-02 Layout.pdf	Aaron 	AF 01	Remove parking lot improvements from this set.	Will revise.
<div>No</div>		1	PDCO Group	L-02 Layout.pdf	Aaron 	AF 02	Extend the wall all the way across	
<div>No</div>		1	PDCO Group	L-06 Planting.pdf	Aaron 	AFG 01	Extend shrubs to meet existing.	

Save Changemark Updates

☐ Show My Changemarks

☐ Show All Changemarks for All Cycles



Project File Markups

Publish to PDF

Export to Excel



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APPENDIX



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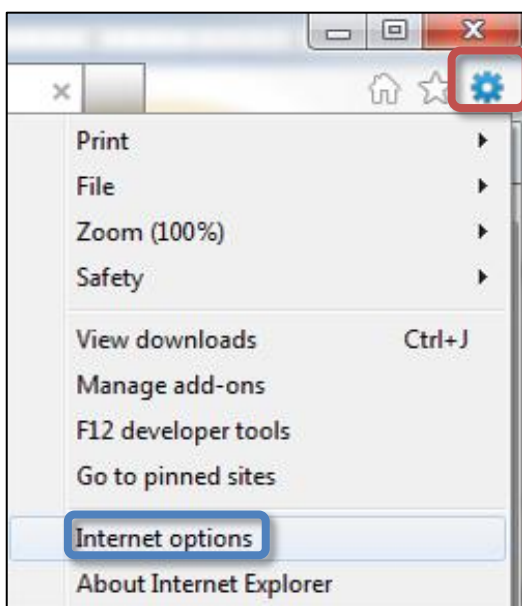


Montgomery Parks

Allow Trusted Sites

Before installing any of the components necessary to run ePlans on your computer, you need to verify that ePlans is recognized as a Trusted Site by your copy of Internet Explorer. Because of the amount of information transmitted between your computer and the ePlans server, Explorer may mistakenly identify ePlans as a malicious website. By identifying it as a Trusted Site, you can ensure Explorer will allow you to access the site. *Administrative rights to your computer are required to install these components.*

1. Open Internet Explorer and click the “Tools” icon. Select “Internet Options” from the dropdown menu. The Internet Options Menu will open in a new window.



2. Click the “Security” tab.
3. Click the “Trusted Sites” button in the menu titled “select a zone to view or change security settings.” This will activate the “Sites” button just below that window.
4. Click the “Sites” button. This will open a dialog box that allows you to add ePlans as a trusted site to Internet Explorer.
5. Type or paste the main ePlans web address (<https://eplans.montgomeryplanning.org>) and click the “Add” button, and then click the “Close” button to return to the Internet Options Menu.
6. Click the “OK” button in the Internet Options window to close that window and return to Internet Explorer.



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Internet Options

General **Security** Privacy Content Connections Programs Advanced

Select a zone to view or change security settings.

Internet Local intranet **Trusted sites** Restricted sites

Trusted sites

This zone contains websites that you trust not to damage your computer or your files.

Security level for this zone

Allowed levels for this zone: All

Medium

- Prompts before downloading potentially unsafe content
- Unsigned ActiveX controls will not be downloaded

☐ Enable Protected Mode (requires restarting Internet Explorer)

Custom level... Default level

Reset all zones to default level

OK Cancel Apply

Trusted sites

You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.

Add this website to the zone:

Add

Websites:

Remove

☒ Require server verification (https:) for all sites in this zone

Close

Labels and Arrows:

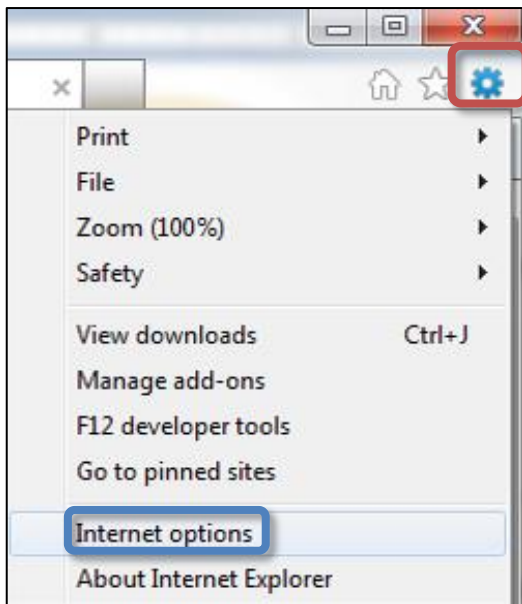
- Security Tab
- Trusted Sites
- Sites
- OK
- ePlans Web Address
- Add
- Close



Disabling Pop-Up Blocker

In order for ePlans to function properly, the platform needs to automatically open new windows within Internet Explorer. To make sure Internet Explorer allows this, you will need to disable the Pop-Up Blocker for ePlans.

1. Open Internet Explorer and click on the “Tools” icon. Select “Internet Options” from the dropdown menu. The Internet Options Menu will open in a new window.



2. Click the “Privacy” tab.
3. Click the “Settings” button to open the Pop-Up Blocker Settings Window.
4. Type or paste the main ePlans web address (<https://eplans.montgomeryplanning.org>) and click the “Add” button, and then click the “Close” button to return to the Internet Options Menu.
5. Click the “OK” button in the Internet Options Window to close that window and return to Internet Explorer.



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Montgomery Parks

Internet Options

General Security **Privacy** Content Connections Programs Advanced

Settings

Select a setting for the Internet zone.

Medium

- Blocks third-party cookies that do not have a compact privacy policy
- Blocks third-party cookies that save information that can be used to contact you without your explicit consent
- Restricts first-party cookies that save information that can be used to contact you without your implicit consent

Sites Import Advanced Default

Location

☐ Never allow websites to request your physical location [Clear Sites](#)

Pop-up Blocker

☒ Turn on Pop-up Blocker [Settings](#)

InPrivate

☒ Disable toolbars and extensions when InPrivate Browsing starts

OK Cancel Apply

Privacy Tab

Settings

OK

Pop-up Blocker Settings

Exceptions

☒ Pop-ups are currently blocked. You can allow pop-ups from specific websites by adding the site to the list below.

Address of website to allow:

eplans.montgomeryplanning.org [Add](#)

Allowed sites:

eplans.montgomeryplanning.org
sn2prd0410.outlook.com

[Remove](#) [Remove all...](#)

Notifications and blocking level:

☒ Play a sound when a pop-up is blocked.

☒ Show Notification bar when a pop-up is blocked.

Blocking level:

Medium: Block most automatic pop-ups

[Learn more about Pop-up Blocker](#) [Close](#)

ePlans Web Address

Add

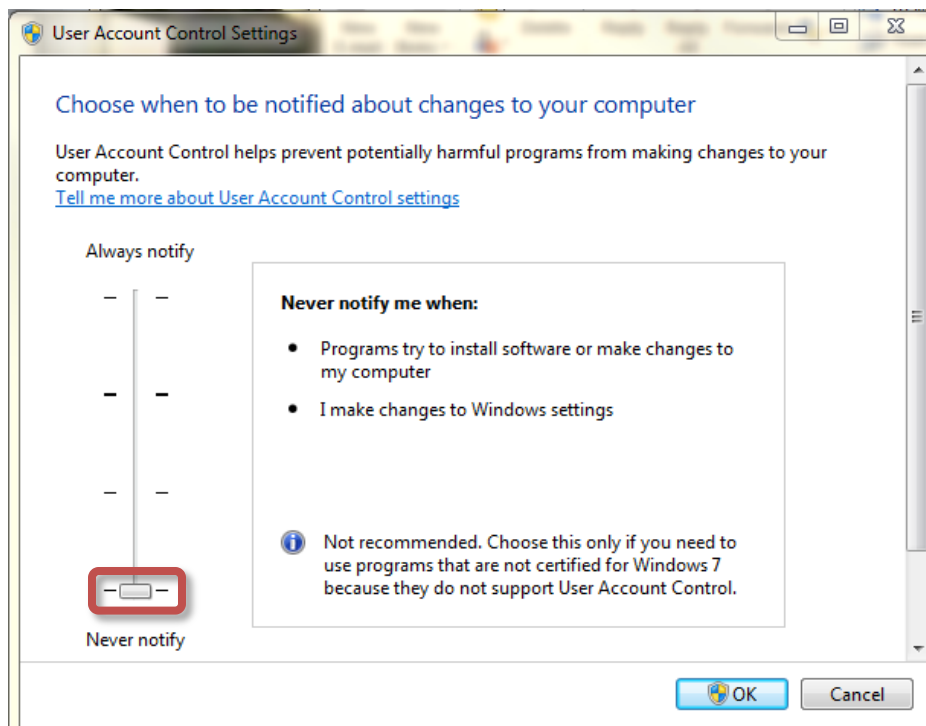
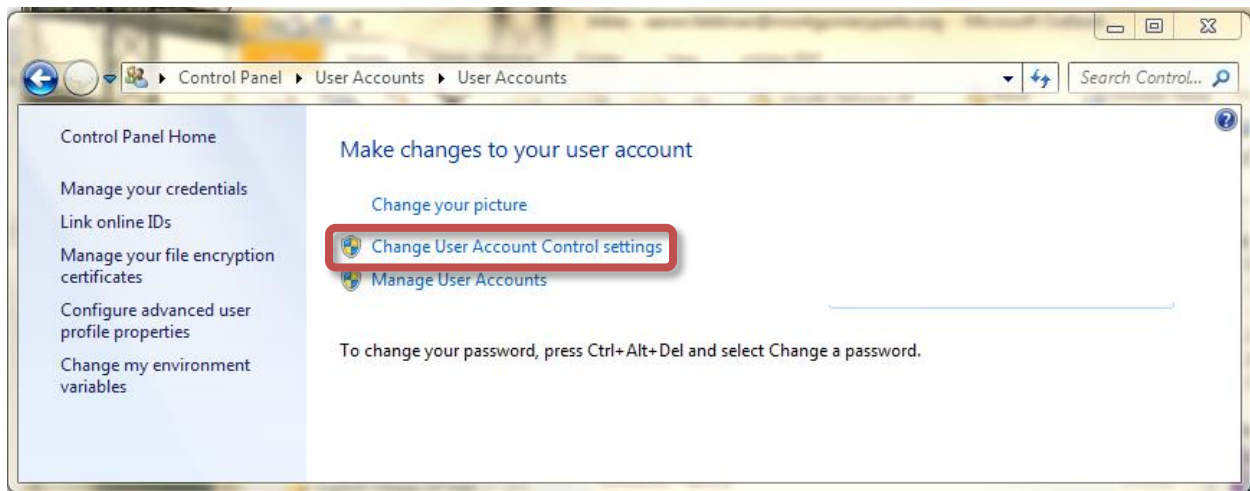
Close



Disabling User Account Control

Computers running Windows Vista or Windows 7 may require you to disable the User Activated Control (UAC) feature before allowing you to [install ActiveX Controls](#). Disabling UAC should be discussed with your Network Administrator prior to making changes to your system. In all cases, the UAC can and should be returned to its former settings once you are finished installing ActiveX controls.

1. From the Windows Start Menu, open the Control Panel and navigate to the User Account Menu.
2. Click the “Turn User Account Control On or Off” (Vista) or “Change User Account Control Settings” (Windows 7) link. This will open the UAC Settings Menu.





Montgomery Parks

3. Update the UAC by following the instructions below:
 - Vista: Uncheck the “Use User Account Control (UAC) to help protect your computer checkbox.
 - Windows 7: Drag the scroll bar down to “Never Notify.”
4. Click “Ok.”
5. Restart your computer for the changes to take effect.
6. Once ActiveX Controls have been installed, follow steps 1 through 5 above to return to your original UAC settings.



Install ActiveX Controls

ProjectDox requires the installation of several ActiveX Controls to be able to perform certain actions in ProjectDox. These actions include: Uploading Files, Downloading Files, Viewing Files, and Viewing Help Information.

1. At the ePlans Login Screen, click the “Install ProjectDox Components” link at the bottom left corner of the screen.

2. A small window will appear out of the bottom or top edge of your Internet Explorer Window asking if you want to run or save a file. Click the “Run” button. If this window does not appear, you will need to call the Help Desk to obtain administrative access to download and run ActiveX Controls.

3. Once the file is downloaded, the ProjectDox Components 7.7 Setup Wizard will automatically launch. Follow the instructions in the Setup Wizard. When the Setup Wizard is complete, you should be able to run ePlans on your computer.



Montgomery Parks

Park Facility Codes

Each project created within ePlans is assigned a unique Project Number, consisting of several pieces of information that relate directly to the location, timing and type of work being done. The first component of the Project Number is the Park Facility Code. Every facility within the Montgomery County Parks system has a unique Facility Code consisting of a letter followed by a two-digit number. All of the Park Facility Codes for Montgomery County Parks are listed below.

E24	Aberdeen Local Park	M57	Black Hill Visitors Center
A01	Acorn Urban Park	F20	Blair Local Park
S01	Adventure Conservation Park	S02	Blockhouse Point Conservation Park
N48	Adventure Nature Center Building	D10	Blueberry Hill Local Park
K07	Ag History Farm Park - Activity Center	F16	Blunt Road Local Park
K01	Agricultural History Farm Park	C26	Bonifant Nca
B28	Amity Drive Neighborhood Park	P69	Booze Creek Stream Valley Park
D02	Aquarius Local Park	C38	Boundary Park Nca
D03	Arcola Local Park	D11	Bowie Mill Local Park
C01	Arctic Nca	F21	Boyds Local Park
D04	Argyle Local Park	C04	Bradley Hills Nca
N61	Argyle Local Park Recreation Facility	D13	Bradley Local Park
F22	Arora Hills Local Park	B02	Breewood Neighborhood Park
F01	Aspen Hill Local Park	P88	Broad Run Stream Valley Park Unit #1
F10	Avenel Local Park	D14	Broadacres Local Park
D05	Ayrlawn Local Park	B65	Brookdale Neighborhood Park
N47	Ayrlawn Recreation Building	B03	Brookmont Neighborhood Park
A03	Battery Lane Urban Park	M03	Brookside Gardens
M01	Bauer Drive Local Park	M59	Brookside Visitor Center
B81	Becca Lilly Neighborhood Park	D15	Brookview Local Park
D06	Bedfordshire Neighborhood Park	C46	Browns Corner Nca
B01	Bel Pre Neighborhood Park	B04	Buck Branch Neighborhood Park
C02	Beret Nca	P02	Buck Branch Stream Valley Park
C45	Berryville Park Nca	P01	Bucklodge Branch Stream Valley Park
D08	Beverly Farms Local Park	S12	Bucklodge Conservation Park
D09	Big Pines Local Park	E57	Bullis Local Park
C03	Birch Drive Nca	D17	Burning Tree Local Park
M48	Black Hill Boat Rentals	N31	Burnt Mills East Special Park
N27	Black Hill Maintenance Facility	N34	Burnt Mills West Special Park
N29	Black Hill Park Police Substation	D18	Burtonsville Local Park
G07	Black Hill Regional Park	P03	Cabin Branch Stream Valley Park



Montgomery Parks

N41	Cabin John Ice Rink Bldg	S10	Cedar Island Conservation Park
M06	Cabin John Ice Rink Propert	F17	Centerway Local Park
N38	Cabin John Indoor Tennis Bldg	C07	Charred Oak Nca
M05	Cabin John Indoor Tennis Property	A04	Chase Avenue Urban Park
D19	Cabin John Local Park	A05	Cheltenham Drive Urban Park
M43	Cabin John Regional Action Playland	D82	Cherrywood Local Park
M24	Cabin John Regional Athletic Area	D24	Chevy Chase Local Park
M35	Cabin John Regional Family Picnic Area	C47	Chevy Chase Open Space Urban Park
M36	Cabin John Regional Group Camping Area	B83	Cindy Lane Neighborhood Park
M33	Cabin John Regional Group Picnic Area	E47	Clarksburg Neighborhood Park
M99	Cabin John Regional Headquarters	N64	Clarksburg Neighborhood Park Rec Bldg
M34	Cabin John Regional Maintenance Facility	A31	Clarksburg Triangle Urban Park
G01	Cabin John Regional Park	E23	Clarksburg Village North Local Park
M49	Cabin John Regional Train	D27	Clearspring Local Park
P04	Cabin John Stream Valley Unit #1	D29	Cloverly Local Park
P05	Cabin John Stream Valley Unit #2	N65	Colesville Local Park Recreation Facility
P06	Cabin John Stream Valley Unit #3	D30	Colesville Local Park
P07	Cabin John Stream Valley Unit #4	B06	Colesville Manor Neighborhood Park
P08	Cabin John Stream Valley Unit #5	B07	College View Neighborhood Park
P71	Cabin John Stream Valley Unit #6	B75	Colt Terrace Neighborhood Park
N92	Cabin John Train Station Bldg	F02	Columbia Local Park
M55	Cabin John Train Station Property	E58	Concord Local Park
L16	Callithea Farm Special Park	B72	Connecticut Avenue Neighborhood Park
F03	Calverton Galway Local Park	B08	Countryside Neighborhood Park
B05	Calverton Nca	P09	Crabbs Branch Stream Valley Park
N62	Camp Seneca Spcl Park Rec Facility	E74	Cross Creek Club Local Park
L02	Camp Seneca Special Park	B09	Dale Drive Neighborhood Park
D20	Cannon Road Local Park	B10	Damascus Neighborhood Park
H06	Capital Crescent Trail Special Park	G02	Damascus Recreational Park
A29	Capitol View Park Open Space	K09	Darby Historical/Cultural Park
D21	Capitol View-Homewood Local Park	D31	Darnestown Local Park
	Captl View Homewood Local Park Rec	A26	Darnestown Square Urban Park
N63	Facility	A06	Dartmouth Nca
C06	Carderock Springs Nca	B86	Derwood Station Neighborhood Park
A08	Caroline Freeland Urban Park	D32	Dewey Local Park
M07	Carson Farm Special Park	G03	Dickerson Conservation Park
D22	Cashell Neighborhood Park	D33	Dickerson Local Park
E64	Cedar Creek Local Park		



Montgomery Parks

L03	Dowden's Ordinary Special Park	B19	Garrett Park - Waverly Neighborhood Park
C08	Drake Drive Nca	N42	Garrett Park Day Care Center
B11	Druid Drive Neighborhood Park	D43	Garrett Park Estates Local Park
P10	Dry Seneca Creek Stream Valley Unit #1	N45	Garrett Park Library
P75	Dry Seneca Creek Stream Valley Unit #2	B20	General Getty Neighborhood Park
D34	Dufief Local Park	D44	Georgian Forest Local Park
C43	Duvall Road Nca	D45	Germantown East Local Park
D35	East Norbeck Local Park	A25	Germantown Square Urban Park
A07	East Silver Spring Urban Park	A28	Germantown Town Center Urban Park
C30	East-West Highway Nca	B21	Glen Echo Heights Neighborhood Park
B69	Edgewood Neighborhood Park	B22	Glen Haven Neighborhood Park
B76	Edith Throckmorton Neighborhood Park	F05	Glen Hills Local Park
D36	Ednor Local Park	B23	Glen Mar Neighborhood Park
N46	Ednor Recreation Building	D47	Glenfield Local Park
A09	Ellsworth Urban Park	A27	Glenmont Greenway Urban Park
A10	Elm Street Urban Park	D48	Glenmont Local Park
C10	Elmhirst Parkway Nca	N66	Glenmont Local Park Recreation Facility
C37	Emory Grove Hills Nca	D49	Good Hope Local Park
C11	English Court Nca	P11	Goshen Branch Stream Valley Park
M38	English Manor Elementary School	S13	Goshen Elm Conservation Park
B12	Evans Parkway Neighborhood Park	G05	Goshen Recreational Park
C41	Fairdale Road Nca	P78	Great Seneca Stream Valley Unit #1
G04	Fairland Recreational Park	P79	Great Seneca Stream Valley Unit #2
A11	Fairview Road Urban Park	P80	Great Seneca Stream Valley Unit #3
D38	Falls Road Local Park	P81	Great Seneca Stream Valley Unit #4
D39	Farmland Drive Local Park	P82	Great Seneca Stream Valley Unit #5
A12	Fenton Street Urban Park	P83	Great Seneca Stream Valley Unit #6
D40	Fernwood Local Park	P84	Great Seneca Stream Valley Unit #7
D41	Fleming Local Park	P85	Great Seneca Stream Valley Unit #8
A13	Flower Avenue Urban Park	P86	Great Seneca Stream Valley Unit #9
E50	Flower Hill Local Park	S03	Green Farm Conservation Park
B13	Flower Valley Neighborhood Park	E59	Greenbriar Local Park
B14	Forest Glen Neighborhood Park	B24	Greenwich Neighborhood Park
B16	Forest Grove Neighborhood Park	D51	Greenwood Local Park
E71	Fountain Hills Local Park	B70	Gregerscroft Neighborhood Park
B17	Fox Chapel Neighborhood Park	E53	Griffith Local Park
B18	Fox Hills West Neighborhood Park	H01	Gude Drive Recreational Park



Montgomery Parks

D52	Gunner's Branch Local Park	B32	Kensington-Frederick Ave Neighborhood Pk
D53	Gunner's Lake Local Park	P15	Kilgour Branch Stream Valley Park
C33	Gunner's Village Nca	E69	Kings Crossing Local Park
B25	Harmony Hills Neighborhood Park	D61	Kings Local Park
C13	Hastings Nca	D83	Kingsview Local Park
P13	Hawlings River Stream Valley Park	A15	Kramer Urban Park
B54	Heritage Farm Neighborhood Park	M56	Lake Needwood Snack Bar
B26	Highland Stone Neighborhood Park	F06	Layhill Local Park
N60	Hillandale Adult Edu Center	D63	Layhill Village Local Park
N67	Hillandale Local Park Recreation Facility	H09	Laytonia Recreational Park
D54	Hillandale Local Park	D64	Laytonsville Local Park
N18	Hillandale Park Office Building	D46	Leaman Local Park
B27	Hillmead Neighborhood Park	B74	Leland Neighborhood Park
B82	Hillwood Manor Neighborhood Park	C31	Leland-Beach Triangle Nca
L18	Historic Hyattstown Open Space Spcl Park	P16	Little Bennett Creek Stream Valley Park
B84	Hopefield Neighborhood Park	M52	Little Bennett Golf Course Property
S15	Hoyles Mill Conservation Park	N26	Little Bennett Maintenance Facility
E68	Hoyles Mill Village Local Park	G06	Little Bennett Regional Park
D23	Hunters Woods Local Park	M53	Little Bennett Regional Park Camp Ground
C35	Hunters Woods Nca	P17	Little Falls Stream Valley Unit #1
D55	Indian Spring Terrace Local Park	P18	Little Falls Stream Valley Unit #2
N68	Indiansprng Terrace Local Park Rec Facility	P23	Little Seneca Greenway Stream Valley Pk
C40	Inverness Forest Nca	P19	Little Seneca Stream Valley Unit #1
D56	Jesup-Blair Local Park	P20	Little Seneca Stream Valley Unit #2
B29	John Haines Neighborhood Park	P21	Little Seneca Stream Valley Unit #3
D37	Johnson Local Park	P22	Little Seneca Stream Valley Unit #4
B30	Jones Mill Road Neighborhood Park	M25	Locust Grove Nature Center
L17	Josiah Henson Special Park	B33	Locust Hill Neighborhood Park
E67	Juniper-Blair Neighborhood Park	L10	Lodge At Seneca Creek
N69	Kemp Mill Estates Local Park Rec Facility	D65	Long Branch Local Park
D57	Kemp Mill Estates Local Park	P24	Long Branch Stream Valley Unit #1
A14	Kemp Mill Urban Park	P73	Long Branch Stream Valley Unit #1a
N70	Ken-Gar Palisades Local Park Rec Facility	P76	Long Branch Stream Valley Unit #2
D58	Ken-Gar Palisades Local Park	B66	Long Branch-Arliss Neighborhood Park
D59	Kensington Cabin Local Park	B77	Long Branch-Garland Neighborhood Park
B31	Kensington Heights Neighborhood Park	D66	Long Branch-Wayne Local Park
P14	Kensington Parkway Stream Valley Park	D67	Longwood Local Park



Montgomery Parks

D68	Luxmanor Local Park	N32	MLK, Jr. Maintenance Yard
N71	Lynnbrook Local Park Recreation Facility	B36	Montgomery Hills Neighborhood Park
D69	Lynnbrook Local Park	N05	Montgomery Regional Office-MRO
P25	Magruder Branch Stream Valley Unit #1	D76	Mount Zion Local Park
P77	Magruder Branch Stream Valley Unit #2	C17	Moyer Road Local Park
C48	Maiden Lane Urban Park	P27	Muddy Branch Stream Valley Unit #1
E65	Manor Oaks Local Park	P28	Muddy Branch Stream Valley Unit #2
C36	Manor Park NCA	P29	Muddy Branch Stream Valley Unit #3
N72	Maplewood-Alta Vista Recreation Facility	E56	Muncaster Manor Local Park
D71	Maplewood-Alta Vista Local Park	H03	Muncaster Recreational Park
H02	Martin Luther King Recreational Park	M50	Needwood Boat Rental Area
L09	Matthew Henson State Park Unit #1	M08	Needwood Visitor Center Property
L11	Matthew Henson State Park Unit #2	B37	New Hampshire Estates Neighborhood Park
L19	Matthew Henson State Park Unit #3	S11	New Hope Island Conservation Park
L20	Matthew Henson State Park Unit #4	D77	Newport Mill Local Park
S04	Maydale Conservation Park	E62	Nike Missile Local Park
N44	Maydale Nature Center	D78	Nolte Local Park
L01	McCrillis Gardens Special Park	N74	Nolte Local Park Recreation Facility
B34	McKenney Hills Neighborhood Park	B38	Norbeck Meadows Neighborhood Park
S08	McKnew Conservation Park	B39	Norbeck-Muncaster Mill Neighborhood Park
E36	McKnew Local Park	N75	Norbeck-Muncaster Mill Recreation Facility
N73	Meadowbrook Local Park Recreation Facility	P30	North Branch Stream Valley Unit #2
F08	Meadowbrook Local Park	P31	North Branch Stream Valley Unit #3
N03	Meadowbrook Maintenance Yard	P32	North Branch Stream Valley Unit #4
N22	Meadowbrook Maintenance Yard Annex	N76	North Chevy Chase Local Park Rec Facility
M09	Meadowbrook Riding Stables	D79	North Chevy Chase Local Park
D72	Meadowood Local Park	N77	North Four Corners Local Park Rec Facility
M10	Meadowside Nature Center	D80	North Four Corners Local Park
B35	Merrimac Neighborhood Park	D81	North Gate Local Park
A16	Metro Urban Park		North Germantown Greenway Stream
C15	Middlebrook Hill NCA	S05	Valley Park
D74	Middlevale Neighborhood Park	C18	North Point NCA
M47	Mildred Pumphrey Community Center	M13	Northwest Branch Golf Course
C42	Miles Road NCA	G08	Northwest Branch Recreational Park
P26	Mill Creek Stream Valley Park	P37	Northwest Branch Stream Valley Unit #7
D75	Mill Creek Towne Local Park	P34	Northwest Branch Stream Valley Unit #3
C16	Mineral Springs NCA	P35	Northwest Branch Stream Valley Unit #4
		P36	Northwest Branch Stream Valley Unit #5



Montgomery Parks

D07	Norwood Local Park	N81	Pinecrest Local Park Recreation Facility
N78	Norwood Local Park Recreation Facility	D89	Pinecrest Local Park
C19	Norwood Village NCA	D90	Pleasant View Local Park
H04	Oak Ridge Conservation Park	D91	Plumgar Local Park
N07	Oakley Cabin Museum Park	N11	Pope Farm Nursery
C20	Old Farm NCA	D62	Potomac Community Neighborhood Park
B40	Olney Acres Neighborhood Park	L06	Potomac Horse Center Special Park
D84	Olney Family Neighborhood Park	C39	Potomac Palisades Conservation Park
N33	Olney Manor Maintenance Facility	B45	Quebec Terrace Neighborhood Park
H05	Olney Manor Recreational Park	D92	Quince Orchard Knolls Local Park
B41	Olney Mill Neighborhood Park	B46	Quince Orchard Valley Neighborhood Park
B42	Olney Square Neighborhood Park	N82	Quince Orchard Valley Recreation Facility
B67	Opal A. Daniels Neighborhood Park	G09	Rachel Carson Conservation Park
D85	Orchard Neighborhood Park	D93	Randolph Hills Local Park
P12	Ovid Hazen Wells Greenway	D94	Ray's Meadow Local Park
L07	Ovid Hazen Wells Recreational Park	K08	Red Door Store Historical/Cultural Park
D86	Owens Local Park	P42	Reddy Branch Stream Valley Unit #1
N79	Owens Local Park Recreation Facility	P43	Reddy Branch Stream Valley Unit #2
B43	Paint Branch Neighborhood Park	P44	Reddy Branch Stream Valley Unit #3
P38	Paint Branch Stream Valley Unit #4	D95	Redland Local Park
P39	Paint Branch Stream Valley Unit #5	L13	Rickman Farm Horse Park Special Park
P40	Paint Branch Stream Valley Unit #6	H07	Ridge Road Recreational Park
N17	Park Police Headquarters-Saddlebrook	S14	River Road Shale Barrens Conservation Park
N25	Park Police-Special Operations-Woodlawn	M37	Rock Creek Hills Local Park
F09	Parkland Local Park	N28	Rock Creek Maintenance Facility
M45	Parklawn Group Camping Area	M11	Rock Creek Regional Needwood Golf Course
M44	Parklawn Group Picnicking Area	N06	Rock Creek Regional Needwood Mansion
D87	Parklawn Local Park	G10	Rock Creek Regional Park
N09	Parkside Headquarters	P45	Rock Creek Stream Valley Unit #1
S07	Patuxent River Watershed Conservation Pk	P52	Rock Creek Stream Valley Unit #11
C21	Peach Orchard Neighborhood Conservation Area	P53	Rock Creek Stream Valley Unit #12
B44	Peachwood Neighborhood Park	P54	Rock Creek Stream Valley Unit #14
K06	Pennyfield Lock NCA	P55	Rock Creek Stream Valley Unit #15
A17	Philadelphia Avenue Urban Park	P56	Rock Creek Stream Valley Unit #16
E75	Piedmont Crossing Local Park	P46	Rock Creek Stream Valley Unit #2
N80	Pilgrim Hill Local Park Recreation Facility	P47	Rock Creek Stream Valley Unit #3
D88	Pilgrim Hill Local Park	P48	Rock Creek Stream Valley Unit #4



Montgomery Parks

P49	Rock Creek Stream Valley Unit #5	B71	Sherwood Forest Manor Neighborhood Park
P50	Rock Creek Stream Valley Unit #6	C24	Sherwood Forest NCA
P51	Rock Creek Stream Valley Unit #7	M61	Shirley Povich Field
P68	Rock Run Stream Valley Park	B50	Silver Spring Intermed Neighborhood Park
	Rockwood Education Center Cabin Tall	B51	Sligo Avenue Neighborhood Park
N55	Timber	N84	Sligo Avenue Recreation Facility
N54	Rockwood Education Center Cabin The Oaks	B52	Sligo Cabin Neighborhood Park
	Rockwood Educational Center Cabin The	B80	Sligo Creek North Neighborhood Park
N53	Western Hill	L04	Sligo Creek Public Golf Course
N21	Rockwood Education Center	P57	Sligo Creek Stream Valley Unit #1
O01	Rockwood Manor House Building	P72	Sligo Creek Stream Valley Unit #1a
N24	Rockwood Manor House Property	P58	Sligo Creek Stream Valley Unit #2
	Rockwood Special Park Maintenance	P59	Sligo Creek Stream Valley Unit #3
N52	Garage	P60	Sligo Creek Stream Valley Unit #4
N51	Rockwood Special Park French House	P61	Sligo Creek Stream Valley Unit #5
N50	Rockwood Special Park Skyview House	C44	Sligo Mill NCA
L08	Rockwood Special Park	B85	Sligo Mill Overlook Neighborhood Park
D96	Rosemary Hills-Lyttonsville Local Park	B53	Sligo-Bennington Neighborhood Park
A18	Royce Hanson Urban Park		Sligo-Dennis Avenue Local Park Recreation
E54	Saddlebrook Local Park	N85	Facility
C23	Saint Paul NCA	E01	Sligo-Dennis Avenue Local Park
D98	Sangamore Local Park	H08	Soccerplex Of South Germantown
B47	Scotland Neighborhood Park	B15	South Four Corners Neighborhood Park
B48	Seek Lane Neighborhood Park	G11	South Germantown Recreational Park
F18	Seneca Crossing Local Park	E02	South Gunner's Branch Local Park
K05	Seneca Landing Boat Ramp	E03	Southeast Olney Local Park
K02	Seneca Landing Special Park	E04	Spencerville Local Park
N36	Seneca Log Cabin Building	E05	Stewarttown Local Park
F19	Seneca Springs Local Park	C25	Stonecrest NCA
O11	Seneca Stone Barn	E06	Stonegate Local Park
	Serpentine Barrons Conservation Park North	E66	Stonehedge Local Park
S16	Unit	N87	Stoneybrook Local Park Recreation Facility
	Serpentine Barrons Conservation Park South	E07	Stoneybrook Local Park
S17	Unit	E08	Strathmore Local Park
D99	Seven Locks Local Park	E09	Stratton Local Park
B49	Seven Oaks Neighborhood Park	E10	Strawberry Knoll Local Park
	Shady Grove Mini Golf Splash Playground	L15	Sugarland Special Park
O07	Ticket Building	F07	Sundown Road Local Park
O12	Shady Grove Splash / Golf Property		
N12	Shady Grove Maintenance Yard		



Montgomery Parks

E11	Takoma - Piney Branch Local Park	B60	Wells Neighborhood Park
B78	Takoma Park Neighborhood Park	B61	Wembrough Neighborhood Park
B79	Takoma Park South Neighborhood Park	E15	West Fairland Local Park
A19	Takoma Urban Park	N49	Westmoreland Hills Local Park Cabin
M58	Takoma-Langley Community Center	E16	Westmoreland Hills Local Park Property
B55	Tamarack Neighborhood Park	M16	Wheaton Regional Ice Rink Property
E51	Tanglewood Neighborhood Park	M31	Wheaton Regional Indoor Tennis Property
S06	Ten Mile Creek Conservation Park	M15	Wheaton Community Building
	Ten Mile Creek Greenway Stream Valley	E17	Wheaton Forest Local Park
P87	Park	N40	Wheaton Ice Rink Building
E12	Tilden Woods Local Park	N39	Wheaton Ice/Inline Building
P63	Tilden Woods Stream Valley Park	N37	Wheaton Indoor Tennis Building
N88	Tildenwoods Local Park Recreation Facility	M26	Wheaton Regional Group Camping Area
E52	Timberlawn Local Park	M28	Wheaton Regional Athletic Area
B56	Tobytown Neighborhood Park	M04	Wheaton Regional Brookside Nature Center
E72	Traville Local Park	M41	Wheaton Regional Carousel
C27	Tuckerman NCA	M30	Wheaton Regional Children's Play Center
C28	Twinponds NCA	M29	Wheaton Regional Family Picnic Area
B57	Unity Neighborhood Park	M62	Wheaton Regional In-Line Property
B68	Upper Long Branch Neighborhood Park	M27	Wheaton Regional Maintenance Facility
P41	Upper Paint Branch Stream Valley Park	G12	Wheaton Regional Park
E73	Upper Rock Creek Local Park	M54	Wheaton Regional Picnic Area Snack Bar
L05	Valley Mill Special Park	N08	Wheaton Regional Shorefield House
B58	Valleywood Neighborhood Park	M17	Wheaton Regional Stables
N89	Veirs Mill Local Park Recreation Facility	M51	Wheaton Regional Train Property
E13	Veirs Mill Local Park	N93	Wheaton Train Station Building
E14	Wall Local Park	A20	Wheaton Veteran's Urban Park
D73	Waring Station Local Park	E18	Wheaton Woods Local Park
A30	Warner Circle Special Park		Wheaton-Claridge Local Park Recreation
S19	Washington Grove Conservation Park	N90	Facility
B59	Washington Square Neighborhood Park	E19	Wheaton-Claridge Local Park
N30	Waters House Special Park	B62	White Flint Neighborhood Park
E61	Waters Landing Local Park	E20	Whittier Woods Local Park
P64	Watts Branch Stream Valley Unit #1	P74	Wildcat Branch Stream Valley Park Unit 1
P65	Watts Branch Stream Valley Unit #2	P62	Wildcat Branch Stream Valley Park Unit 3
P66	Watts Branch Stream Valley Unit #3	B63	Willard Avenue Neighborhood Park
P67	Watts Branch Stream Valley Unit #4	E21	Winding Creek Local Park
P70	Waverly-Schuylkill Neighborhood Park	C29	Windsor NCA



The Maryland-National Capital Park and Planning Commission

Montgomery Parks

E55 Winter's Run Local Park
M63 Wisconsin Place
F12 Wood Local Park
E22 Woodacres Local Park
E63 Woodfield Local Park

K03 Woodlawn Cultural Special Park
N35 Woodlawn Manor Historic House
A21 Woodside Urban Park
L14 Woodstock Equestrian Park
B64 Wyngate Woods Neighborhood Park



The Maryland-National Capital Park and Planning Commission

Montgomery Parks

GLOSSARY



The Maryland-National Capital Park and Planning Commission

Montgomery Parks



Montgomery Parks

ActiveX Controls – Small programs added on to Internet Explorer that allow users to perform certain tasks in the ePlans platform. See page 63 for instructions on how to [install ActiveX Controls](#) on your computer.

Activity Instructions – Directions for completing a task. Activity instructions can be found in a yellow text box at the top of every eForm.

Approve – The documents being reviewed are acceptable. Clicking the “Approve” button in an eForm will move the workflow to the next task. In most cases, clicking the “Approve” button cannot be undone.

Brava Viewer – The program within ePlans that allows you to view and comment on drawings. See page [Error! Bookmark not defined.](#) for [basic viewing instructions](#). See page [Error! Bookmark not defined.](#) for a description of “[Compare Mode](#).” See page [Error! Bookmark not defined.](#) for instructions on making [Changemarks](#). Go to [ftp://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf](http://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf) for further information.

Changemark – Annotations made on top of drawing files within the Brava Viewer as part of a document review. Changemarks are the primary means of making comments on drawings within the ePlans platform. See page [Error! Bookmark not defined.](#) for instructions on making [Changemarks](#).

Checkbox - A graphic element that allows users to make multiple selections from a number of options.



= Unchecked Checkbox



= Checked Checkbox

Complete – The task is finished. Clicking the “Complete” button in an eForm will move the workflow to the next task. In most cases, clicking the “Complete” button cannot be undone.

Consultant - A person or group hired by the Park Development Division to complete a set of contract documents for a specific park development project. The Consultant is responsible for uploading their documents to ePlans for review by the Project Manager and the PDCO Team. The Consultant will also receive and respond to comments made by the Project Manager and PDCO Team. See page 39 for an overview of all of the [Consultant’s tasks](#) in a Workflow.

Dialog Box – A window that appears, containing a message and requiring a user to take a certain action. The simplest type of dialog box is an alert that requires the user to click the “OK” button to move on.

Division Chief - A member of Montgomery County Parks’ Park Development Division, responsible for overseeing all project managers. Standard practices require the Division Chief to apply his or her eSignature to the cover sheet of any set of construction drawings before they go out to bid. See page [Error! Bookmark not defined.](#) for an overview of the [Division Chief’s tasks](#) within a workflow.



Montgomery Parks

eForm – The digital form that appears at the beginning of each task in a workflow. eForms contain a number of components including instructions about completing the task-at-hand, document review types and due dates, messages between various user groups in a workflow, access to reference checklists and lists of comments made on a drawing.

ePlans - An online document review, storage and submittal platform tailored for the Park Development Division of Montgomery County Parks, using Avolve software for ProjectDox. Also referred to as ProjectDox. See page 8 for an [overview of ePlans](#).

eSignature – A scanned copy of one’s signature that serves as a digital verification that a set of contract documents are complete and ready to be sent to contractors for bidding. The [eSignature](#) is the final step in the Workflow, applied to the cover sheet by the Division Chief. See page **Error! Bookmark not defined.** for an overview.

Group – A collection of related users, responsible for completing similar tasks within a workflow. See page 9 for a description of all of the Project [User Groups](#).

Main Tool Bar – A group of buttons found at the top right corner of most screens in ePlans that provide primary navigation functions. See page 17 for a description of all functions within the [Main Tool Bar](#).

PDCO Team – Planning, Design, Construction and Operations Team. A group of internal stakeholders from across the Montgomery County Parks Department that provide input during the design and construction stages of park development projects. See page **Error! Bookmark not defined.** for an overview of the [PDCO Team’s tasks](#) in the Workflow.

Pre-Screen Review – A review of Consultant’s drawings conducted by the Project Manager to ensure the drawings are acceptable to send on to the PDCO Team for their review. This is the second step in the Workflow. See page **Error! Bookmark not defined.** for further information about the [Pre-Screen Review](#).

ProjectDox – A web-enabled collaboration platform that empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, conventional means. Also referred to as ePlans. See page 8 for an [overview](#).

Project List – Basic information about every project assigned to a particular user. This list is visible in the [Active Projects Screen](#), immediately after logging in. See page 17.

Project Manager - A member of Montgomery County Parks’ Park Development Division, responsible for overseeing all aspects of park development projects. The Project Manager is listed as the “Project Coordinator” in the [Project Info Page](#) (See page 19). See page **Error! Bookmark not defined.** for an overview of all of the [Project Manager’s tasks](#) within the Workflow.

Project Template – A collection of default settings most commonly used for Park Development projects. The project template can be used as-is or customized to meet the needs of each specific project. Most



Montgomery Parks

projects will not require any changes to the template. See page **Error! Bookmark not defined.** for instructions on editing the project template.

QAP – Quality Assurance Program. An initiative of the Park Development Division to assure the professional quality and uniform format of construction documents.

QAP Checklist – A guide for Project Managers and Consultants to verify that construction documents meet the standards and requirements developed by the Park Development Division for document content and format prior to issuing them for procurement and construction. The QAP Checklist must be completed by the Project Manager and verified by the QAP Officer prior beginning the procurement process. See page **Error! Bookmark not defined.** for instructions to the Project Manager on [preparing the QAP Checklist](#). See page **Error! Bookmark not defined.** for instructions to the QAP Officer on [verifying the QAP Checklist](#).

QAP Officer - The last person to review a set of contract documents before they go out to bid. Following a standard checklist of requirements, the QAP officer ensures that a set of contract documents meets the standards set forth by Montgomery County Parks. See page **Error! Bookmark not defined.** for an overview of all of the [QAP Officer's tasks](#) in the Workflow.

Radio Button - A graphic element that allows users to make only one selection from a number of options.



= Deselected Radio Button



= Selected Radio Button

Reject – The submitted documents are not acceptable and must be returned to their author for revisions before moving on. Clicking on the “Reject” button will restart the task at hand.

Review Cycle – The entire sequence of tasks required to complete a Workflow one time through.

Save and Close (Save & Close) – An option for users who wish to save their progress within a specific task and return to ePlans to complete the task at a later date. Clicking the “Save and Close” or “Save & Close” button in an eForm will save the user’s progress and close the eForm window. To return to the eForm, click on the associated task within the Task List.

Step – One element within a task. All of the steps must be completed in sequence to complete a task.

System Administrator – An ePlans user with the highest level of permissions and access to all projects, folders and functionality. Contact a System Administrator with any troubleshooting questions or requests for additional permissions.



Montgomery Parks

Task List – Information about any tasks within a Workflow that require the user’s action. Clicking a task will take a user to the eForm for that task. Refer to Page 19 for an overview of the [Task List](#).

Task – A step within the Workflow. Each task must be completed sequentially before moving on to the next task. The Project Manager has the ability to skip any task in a Workflow, with the exception of the QAP Checklist.

Task – Accepted – A task’s status within the Task List that indicates the user responsible has started working on the task but is not yet finished. The task status changes from “Pending” to “Accepted” as soon as the user has clicked on the task in the Task List.

Task – Pending – A task’s status within the Task List that indicates the user responsible has not yet begun working on the task. The task status changes from “Pending” to “Accepted” as soon as the user has clicked on the task in the Task List.

Task – Complete – A task’s status within the Task List that indicates the user responsible has finished the task. The task status changes from “Accepted” to “Complete” as soon as the user clicks on the “Complete” or “Approved” button in the eForm.

User – An individual with an ePlans username and password. Users are separated into User Groups and assigned specific tasks within a Workflow. See page 9 for a description of all of the [User Groups](#).

Versioning – A feature of ePlans that allows users to upload multiple files of the same name and compare the differences from one version of a file to the next using “Compare Mode” in the Brava Viewer . The file’s previous version is kept and logged in ePlan’s history along with its associated markups. All topics and notes remain as a single record, containing a full file history of all versions of the file. Floating the cursor over the link to a file reveals to which version of the file a specific topic refers. See page [Error! Bookmark not defined.](#) for a description of “[Compare Mode](#).”

Workflow – One single, entire sequence of tasks that comprise a standard document review process, based on the Park Development Division’s business process for construction document review. The entire [Park Development Workflow](#) can be seen on page 11.



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Montgomery Parks